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ABSTRACT

The application of basic marketing techniques to achieve the goals of colleges and universities is discussed. The guide is designed to help administrators and admission officers influence the image projected by their institutions. Attention is also directed to how to position an institution among its competitors, how to develop activities and communications to meet customer needs, and how to plan marketing strategies for different program audiences. Marketing techniques can be applied to students, clients, supporters, influential constituents, alumni, foundations, faculty, staff, and corporate support. Image perception, segmenting target audiences, defining institutional mission, and trademarks are also covered, along with the following marketing strategies: product strategy, place or distribution strategy, promotional strategy, and pricing strategy. Case studies illustrate how institutions apply marketing techniques, and questions in each chapter help readers assess the strengths and weaknesses of their current marketing strategies. A chapter on market research by Cletis G. Pride and Joseph S. Fowler outlines the steps for conducting effective surveys of audience attitudes toward the institution. (SW)

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MARKETING HIGHER EDUCATION

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A practical guide for boards of trustees, presidents, institutional advancement practitioners, faculty, and admissions, alumni, and development staff

HE016894

Robert Topor
Cornell University

Including a chapter on market research by Cletis G. Pride and Joseph S. Fowler, National Geographic Society

Council for Advancement and Support of Education

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MARKETING HIGHER EDUCATION

A Practical Guide

Robert Topor

Including a chapter on market research by Cletis G. Pride and Joseph S. Fowler

CASE

Council for Advancement and Support of Education

1983

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Two stonecutters were working on the reconstruction of St. Paul's in London when Sir Christopher Wren asked each what he was doing. The first replied, "I am cutting stone." The second answered, "I am building a cathedral."

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Foreword

ONLY A FEW YEARS AGO, it was certain political suicide in higher education to utter the words "marketing" or "market research" at a faculty meeting or a gathering of the president's cabinet. Instead, we carefully voiced such euphemisms as "improved communications" or "better results." Why? Because we knew that the time-proven, effective promotional techniques pioneered by industry were (and perhaps still are) treated with either skepticism or outright rejection by the academic community.

These attitudes are beginning to change as America's colleges and universities discover that marketing techniques do produce results—in student recruitment, fund raising, alumni relations—and foster institutional relationships among administration and faculty and students. Now, we regularly hear deans and professors talking about targeting, market share, positioning, and feedback with the same excitement that scientists talk about a discovery.

Unfortunately, a little learning is a dangerous thing. As the crunch for students and dollars increases, institutions of higher education will turn more and more to the strategies used for so long by the business community. Marketing is not a panacea. It is a method of approaching problems related to planning and promoting higher education to carefully targeted, discrete audiences. So often the newcomer who discovers marketing sees only the surface evidence of what may have been years of effort and often mistakes gimmicks for substantive, well-organized plans covering many months or even years of preparation.

That is why Bob Topor's guide to the role of marketing in higher education is so important. He writes simply and plainly about the steps required to implement and manage an effective program of institutional marketing. He calls upon a quarter-century of his own experience, as well as the expe-

riences of others who have systematically pursued a marketing approach to higher education.

For some institutions, the results have been astounding, even miraculous. When the first blush of success is over, however, marketing continues to require a long-term, well-planned, consistent, and perhaps even unromantic process. But marketing promises good results in direct proportion to the amount of effort and budget expended.

Once you have read about, understood, and practiced marketing, you have an obligation to share that knowledge and experience. It is gratifying that Bob Topor is willing to share part of his successes in bringing about the goal of marketing higher education.

M. Fredric Volkmann
Director of Public Relations
Washington University in St. Louis

Acknowledgments

I WANT TO THANK those colleagues who, over the years, have taught, influenced, encouraged, and guided me. Hundreds of institutional advancement professionals have contributed, directly or indirectly, to this publication. These include people in admissions, development, public information, institutional advancement, alumni affairs, and administration at Syracuse University, the University of Rochester, Peterson's Guides in Princeton, New Jersey, Wright State University in Dayton, Ohio, and Cornell University in Ithaca, New York.

A special note of thanks to Barbara Ames, Don Lyon, and Donald E. Smith—colleagues who helped me in my younger days at the University of Rochester.

Thanks to Don Schwartz, chairman of Cornell University's Department of Communication Arts, who helped with earlier drafts of this manuscript.

A special thank you to Virginia Carter Smith, vice president of the Council for Advancement and Support of Education (CASE) and fellow faculty member on many CASE programs, and to Fred Volkmann, director of public relations at Washington University in St. Louis, for writing the Foreword. Fred has been a long-time advocate of marketing higher education. His practical application of marketing techniques has created a successful model for others to study.

Thanks to Cletis G. Pride, assistant vice president, National Geographic Society, and Joseph S. Fowler, associate director of promotion and manager of market research there, for writing the chapter on market research.

Thanks to my wife, Martha, for putting up with my writing when I should have been helping with household chores, and to my sons, Mark and Brad.

Special thanks to my secretary, Ruth Costley, master of the word processor, to Virginia Lawless Thompson, editor, Martha de Lyra, book designer, and Carlton Ryan, illustrator, all of Cornell University Media Services. Thanks to Patti LaSalle of Southern Methodist University and formerly of CASE for her help in improving the manuscript.

Marketing Higher Education

Introduction

HIGHER EDUCATION has experienced many changes in the last decade. The changing economic climate and demographics,[1] inflation, and budgetary and staffing concerns force us to take a critical look at ourselves to examine what we are doing in higher education and how we are doing it.

Applying marketing principles that competitive, profit-motivated corporations have used to nonprofit organizations is a growing trend. Schools, colleges, and universities have begun to adapt corporate marketing ideas. Marketing helps an organization see itself from the customer's point of view. It suggests that the nonprofit organization study itself to determine what it is doing and how it is doing it. Marketing is both an introspective (self-analysis) and an external (client-related) process that bridges the gap between the educational provider (your institution) and its clients.

Most nonprofit organizations have found that they can use marketing principles without affecting their basic organizational integrity. In fact, in many cases, an organization's goals become much more precise when it begins to apply marketing principles.

Marketing objectives and plans must relate to the institution's heritage as well as to its future. Before marketing your institution, you need to study its fiscal, political, educational, and philosophical structures. A successful plan cannot be mandated or forced. Marketing plans that succeed do so because they have the support and cooperation of individuals with strong compassion for their own institution and for higher education in general.

Marketing is a concern of every member of a school, college, or university. It is best approached with optimism and

1. Refers to the characteristics of potential clients, for example, age, sex, and income level.

an entrepreneurial attitude. The most successful marketing programs are those that are well planned and executed by people who believe in what they are doing. Marketing is one more tool to help higher education do what it does best—deliver educational opportunities to its constituents.

Chapter 1

Introducing Marketing Concepts

NONPROFIT ORGANIZATIONS are beginning to realize that strong educational programs no longer guarantee continued success. Despite efforts to create and deliver meaningful educational opportunities, institutions of higher education are finding that tuition income and federal, state, and local funds are declining. One way to brace against potential problems is to adapt marketing principles that have been successful for other nonprofit groups.

A school, college, or university is, as much as anything else, a political structure. As such, it has a hierarchy of influence and power. Before you can introduce marketing concepts into a complex educational structure with many areas of power and autonomy, you need to understand its organization. The most successful marketing strategy begins at the top. A board of trustees may be the best group to initiate a comprehensive marketing plan.

Be prepared for some resistance. New ideas are not often met with universal approval. Here are some examples of new ideas that were met with skepticism:

The automobile. "The ordinary 'horseless carriage' is at present a luxury for the wealthy; and although its price will probably fall in the future, it will never, of course, come into as common use as the bicycle." *Literary Digest,* October 14, 1899

Commercial television. "While theoretically and technically television may be feasible, commercially and financially I consider it an impossibility, a development of which we need waste little time dreaming." Lee DeForest, 1926

Moon landing. "Landing and moving around the moon offer so many serious problems for human beings that it may take

science another 200 years to lick them." *Science Digest*, August 1948

The marketing task for a profit-motivated company can be simple: It identifies consumer needs, then develops, produces, promotes, and delivers a product to fill those needs. This works because the company has one primary constituency, or audience, to whom it provides products and from whom it receives funds. A nonprofit organization, such as a college or university, operates in a more complex arena. It has multiple constituencies. For instance, it has clients to whom it provides services and often different constituents from whom it receives financial resources. The profit-motivated corporation has one marketing function—facilitating a direct two-way exchange. This includes resource allocation (providing goods in the form of products) and resource attraction (obtaining revenues). The marketing function is carefully controlled to generate a profit.

By contrast, the nonprofit institution must approach these two marketing tasks differently, because they involve separate and possibly unrelated constituencies.

This inherent difference can be an asset. It can provide flexibility. The marketing approach an institution of higher education uses for clients need not be the same as the one it uses to influence its funding sources. At the same time, this flexibility makes the marketing task more complex, for there are two different functions to perform and two different clients to satisfy.

Some nonprofit institutions have discovered the benefits of moving forward with a united front, communicating their subunits' activities in a coordinated way. Others continue to struggle along with subunits tugging at one another in opposite directions, like a marketing tug of war! The admissions office presents one image to the public, the development office another, and the alumni office yet another. The impressions given are ones of confusion and conflict.

Higher education should approach promotion and marketing as integrated activities. A planned promotional program for a large university assigns each subunit appropriate goals, which are reinforced by the total promotional—call it public relations, if you like—program. A comprehensive plan includes opportunities for promotion of the larger unit, as well as the individual subunits.

Likewise, a community college could develop a marketing plan that coordinates departmental programs under the

umbrella of the parent organization. The idea is to communicate a common message about the institution that reflects reality and that positions your college or university in the educational marketplace.

Concepts to Consider

Five key business concepts provide a basis for marketing higher education.

1. *The self-interest aspect of a transaction or exchange is important.* Both the buyer (client) and the seller (your institution) need to believe that they are receiving greater value than they are giving up.

2. *The marketing task stresses the idea of satisfying client needs.* Your product (undergraduate and graduate curricula, research facilities, special interest programs such as ROTC, black studies, women's studies) must match your clients' educational needs.

3. *The marketing mix—the tools used to market your products—includes promotion, advertising, publicity, public relations, and publications.* This mix is essential to success.

4. *An effective marketing strategy stresses the distinctive competence of an institution.* What distinguishes your institution from similar institutions? What is your institution's differential advantage? (Your institution's differential advantage is the composite of all the factors that make your institution unique.) You can position your school, college, or university and highlight your attributes without judging your competitors. The idea is to sell yourself, not to malign the competition.

5. *Successful marketing begins with the client—not the institution.* It means looking from the outside in, not from inside out.

If higher education had a tangible product, the jobs of promotion and communication would be much easier. You could describe, photograph, and illustrate the product and build an aura around it. Companies such as McDonald's,

Xerox, Kodak, and Procter & Gamble (registered trademarks) have very successfully adapted an old advertising adage: "Promote the sizzle, not the steak!"

It is difficult to promote an intangible product such as higher education by using techniques that are designed for tangible products. Visualizing or describing a service offers limited opportunity to inform, persuade, or promote. However, nonprofit institutions can rely on what many believe is a superior form of promotion: the selling of an idea.

For instance, a good way for a school, college, or university to develop a marketing campaign is to examine "outreach materials"—news releases, publications, newspaper ads, television spots, publications, letters, films, slide shows, newsletters, announcements, alumni magazines, catalogs, viewbooks, development case statements, and so on. Every piece that represents your institution to a constituent communicates ideas, concepts, and impressions.

Prepare an audit of these outreach materials. Put them on a table. Examine them critically. What ideas are they selling? What message does each deliver? Are the materials coordinated? Do they look like they came from the same place? Are they properly identified? Does the name of your institution appear on each? Does the copy suggest a common parent organization? Or are these pieces uncoordinated? Does each institutional component represent itself separately at the expense of the parent institution?

A comprehensive marketing plan will help your institution create coordinated outreach materials. It also will help you position your institution in a complex educational marketplace.

Case Study

Central Community College is located about 20 miles outside of Cleveland. It was founded in 1962 as a result of local concern for up-to-date vocational studies. It had, of course, some of the traditional study areas: English, math, foreign languages, creative writing, art, and music. Its founders recognized the need for programs in new technologies. The college primarily focused on electrical engineering—many local industries supported the concept of training people in electronics. They recognized the need for a local educational source. One member of the founding board of directors was an electrical engineer with degrees from impressive Ivy League institutions.

Central Community College grew, as many community colleges have grown, without any real plan for the future. There really seemed to be no need to think of the future. The institution thrived during the 1960s and early 1970s. Administrators could hardly keep up with a growing enrollment and the demand for new courses of study.

Electrical engineering continued to be a strong area of study, but it was soon lost in the array of other courses, which were added every year.

In 1978-79 student enrollment dropped dramatically. Administrators became alarmed at the immediate and projected enrollment decline. Universities and colleges in Cleveland and in the surrounding area had begun to present stiff competition. Some hired high-powered Cleveland advertising agencies to develop and implement admissions recruitment campaigns. Central Community College was concerned about its future. It relied, to a great extent, on local county funding and this seemed threatened. Combined with reduced enrollment projections, this made the future appear dark for Central.

Fortunately for Central, the admissions director discovered a new book, *Marketing for Nonprofit Organizations*, by a Northwestern University professor, Philip Kotler. Kotler's book described how an institution could introduce marketing concepts. The admissions director was convinced by Kotler's arguments.

NOTE: All institutions and individuals used for the case studies are fictitious and are not intended to represent actual institutions and people. They are intended as examples to bridge the gap between general instruction and the exercise questions found in the work sheets.

She described her marketing ideas to the board of directors. They were skeptical but decided to see if marketing could help Central combat the immediate admissions problem. They made it clear, however, that their real concern was for the future. Could Central survive in what seemed to be a growingly competitive environment?

The admissions director also convinced her fellow administrators that they needed to develop a marketing plan. She received support from the faculty senate. A task force was created to come up with a plan.

They began by studying Central's mission. They realized that although electrical engineering had been a core curriculum, it had become lost in a sea of other courses. Demand for the electrical engineering degree had always been strong. In fact, there was a greater need than ever, because local industry leaders predicted a new wave of technological developments that would require new skills.

Central's task force, under the leadership of the admissions director, researched and created a marketing plan to meet immediate and long-range needs. They were instrumental in recreating the college's mission statement. New energies focused on the electrical engineering curriculum. Courses were added to strengthen the department. Relationships to evolving technologies were established. Outreach materials were completely overhauled to communicate the renewed focus on the electrical engineering curriculum. Related areas of study were strengthened. Some unrelated courses that had never enjoyed good enrollment were phased out. Central established a new identity and communicated it to target audiences.

The results were immediately evident as admissions increased. Central's reputation as an aggressive community college with a strong electrical engineering department grew. It was readily apparent that the marketing task force had met its goal. The board was so impressed that they suggested the marketing team expand its efforts to include other college activities to improve the institution's position in the educational marketplace. Marketing had provided the necessary tools to improve the college.

Work Sheet

Introducing Marketing Concepts

1. Examine your institution's outreach materials. What images do copy and visuals convey? How do typography, format, design, and color work together to communicate your institution's personality? Are these images consistent with the institution? Does each contribute to a central idea?

2. Is the parent institution appropriately identified on each outreach piece?

3. When you examine outreach materials together, do they communicate a clear, common idea that helps people to understand your institution?

4. What impressions do you get when you examine all outreach pieces? List them. Ask others to contribute their impressions. What common ideas emerge? What conflicting ideas?

5. Identify your institution's differential advantages. How can these be used to develop marketing strategies?

Chapter 2

Marketing: What Is It?

Is MARKETING selling worthless products to unsuspecting consumers? Is marketing touting certain individuals for presidential election?

Of course, both of these are exaggerated examples of marketing. A moderate, usable definition of marketing for nonprofit organizations written by a business professor, A. R. Kratchenberg, first appeared in the May 1972 issue of the *Journal of Higher Education:*

> Marketing deals with the concept of uncovering specific needs, satisfying these needs by the development of appropriate goods and services, letting people know of their availability, and offering them at appropriate prices, at the right time and place.

In studying this definition, you see that marketing emphasizes the user or client. The primary focus is on the user's needs.

Figure 1 shows a comparison between traditional and contemporary methods of delivering goods and services. The traditional method is primarily a one-way process from institution to consumer. In the contemporary marketing process, the institution remains in the picture, ready to receive feedback that helps it to analyze the effectiveness of its marketing strategy.

There are other differences between traditional and contemporary marketing methods. In the contemporary process:

1. Institutional marketing plans should begin with market research. Surveys of target audiences help to create plans to market admissions, development and alumni affairs, and other activities.

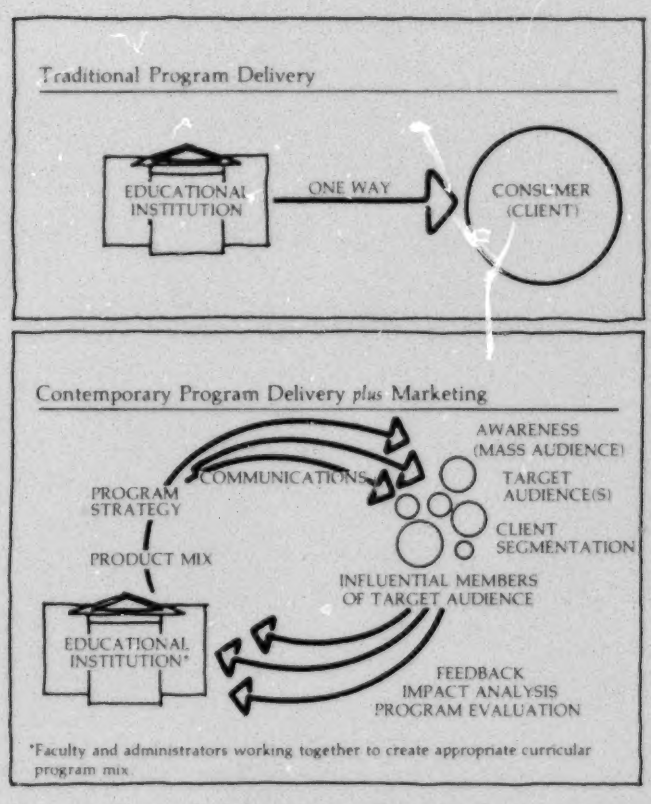

Figure 1. Comparison between traditional and contemporary program delivery.

2. The institution is concerned about product mix. In marketing higher education, you can think of the curricula as products. Each product represents a program area (arts and science, business, fine arts, music, engineering). The program mix of an institution is important, should be carefully created by faculty and administrators, and should relate to client needs (going back to our definition of marketing). This carefully planned mix is central to an institution's marketing.

3. The client population is studied and program objectives and program strategies relate to population needs. Primary, secondary, and tertiary audience

segments need to be considered. Influential members of your audience (from whichever segment) also must be identified.

4. Faculty and staff work together, across departmental lines, to create collective program and institutional impact.

5. Communications methods and systems are critical to an institution's program delivery. Communications should be created that relate to identified target audiences.

6. Evaluation systems measure client attitudes. Client feedback is essential for effective program planning, delivery, and maintenance.

7. Products (or courses) are measured in terms of life cycle (see figure 2). For example, certain courses in a college of home economics may no longer be appropriate because of changes in our society. New courses in a college of business may be required because of technological developments. A faculty member needs to be aware of the product's life cycle in relation to his or her planning and in relation to client needs.

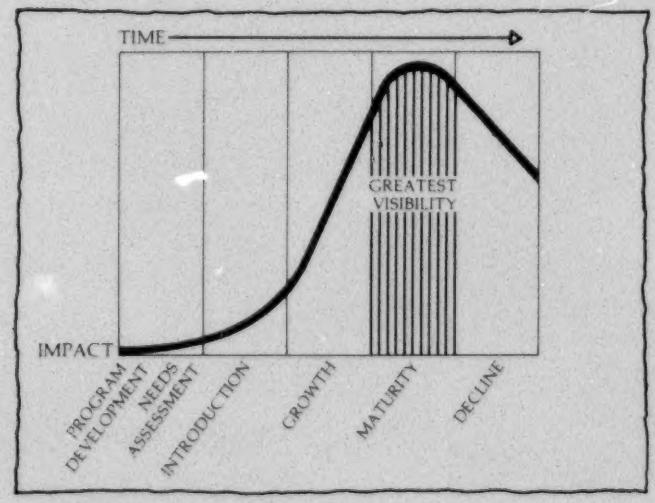

Figure 2. Program life cycles.

The contemporary marketing approach allows an institution to research, plan, and deliver coordinated programs based on strategies that are designed to create the greatest impact and recognition.

It is important to note that an institution's marketing strength lies in the quality of educational programs. Courses and curricula are the products of higher education; without strong programs you cannot hope to achieve marketing goals. The profit-motivated corporation has an old adage: The best way to kill a bad product is to promote it!

Case Study

Tall Timbers College, a state-supported institution, was founded in the mid-1960s. Located at a breathtakingly beautiful spot in sight of the Rockies, Tall Timbers' future seemed as bright as the mountain sunshine.

The college was founded on a revolutionary idea that fitted the mood of the '60s: It would be an experimental college emphasizing learning in a free, unstructured environment. Classes would be taught in seminar style. The faculty would evaluate students by using narrative statements. Instead of the usual departments, students would major in interdisciplinary areas.

When it opened, the college turned away five applicants for every one accepted. As would be expected, it attracted faculty and students of the 1960s—people who characterized the counterculture of the times. Things went well until the late 1970s. Then the economy took a sharp downturn. Jobs became scarce. A new wave of conservatism in politics and vocationalism in education swept the country. Enrollment at Tall Timbers dropped alarmingly. And in its home state, the college found legislative appropriations much harder to come by. A story about Tall Timbers in the *Morning Dispatch*, the state's largest circulation daily, carried the headline, "The Experiment That Fizzled." It quoted the president of another state institution who demanded that Tall Timbers close its doors in order to save her institution.

It was clear that the institution must change to survive. The first step the president took was to appoint both a new and energetic admissions director and a marketing committee made up of administrators, faculty, and students. The marketing committee conducted surveys and found that Tall Timbers indeed needed to change. It must show through its programs, grading system, and literature that the college prepares students for careers as well as for "the good life."

Because the grading system had come to symbolize Tall Timbers' approach, revising it proved difficult. Students threatened to quit if letter grades were introduced. The student newspaper opposed the change. And many professors, drawn by the college's free-style philosophy, denounced what they saw as a "sellout" of Tall Timbers' principles.

Despite this opposition, the new admissions director and the marketing committee made a persuasive case. They pointed out that Tall Timbers' philosophy would indeed perish if the institution couldn't attract enough students.

They suggested that narrative statements be supplemented, not replaced, by letter grades. In a close vote, this viewpoint prevailed.

The newly printed admissions literature gave a picture of an evolving Tall Timbers. A chart related interdisciplinary courses to more traditional fields of biology, chemistry, sociology, art, and so on. Photographs showed undergraduates involved in research projects and doing job-related field work. Knowing that it's easier to change attitudes through personal contact than through media, the marketing team encouraged more visitors to Tall Timbers. It started workshops for guidance counselors and invited prospective students to campus. A once-a-year fair drew several thousand area residents for science exhibits, concerts, and athletic events—all free. Soon the word began to spread that Tall Timbers was as in tune with the times in the 1980s as it had been in the 1960s.

Work Sheet

Marketing: What Is It?

1. How does traditional curricular program delivery differ from contemporary delivery?

2. When marketing is introduced to a school, college, or university, the focus is on client needs. Identify and describe the client needs in your institution.

3. List the communications methods and systems of your institution. What other options are available?

4. Have you identified key constituents? How are you delivering information to them?

5. How can a marketing approach improve your educational programs?

6. Identify current program activities. Where is each program in its life cycle? (figure 2)

Chapter 3

Marketing Higher Education

MARKETING IS AN EXCHANGE PROCESS. In the commercial world, consumers exchange money for products. In the nonprofit sector of higher education, clients exchange tuition for services. The most effective nonprofit organizations offer services that are widely recognized in exchange for fiscal and other forms of support.

The effective institution plans, executes, and evaluates programs in response to (or in anticipation of) clearly identified user needs. These programs are aggressively promoted by the institution in order to maintain visibility. Doing the good deed isn't enough. People need to know about it.

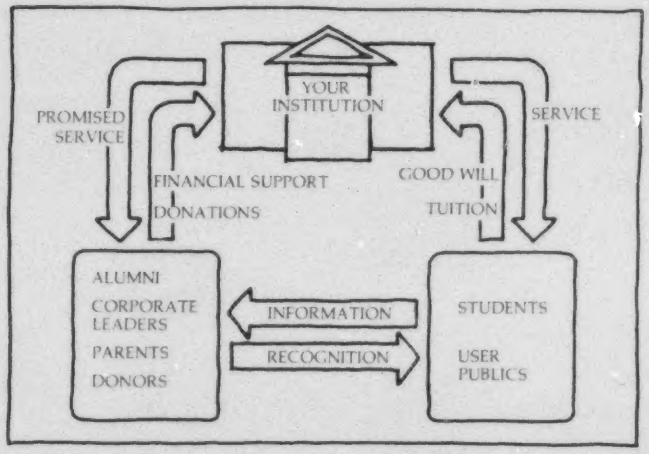

Figure 3. Higher education exchange relationships.

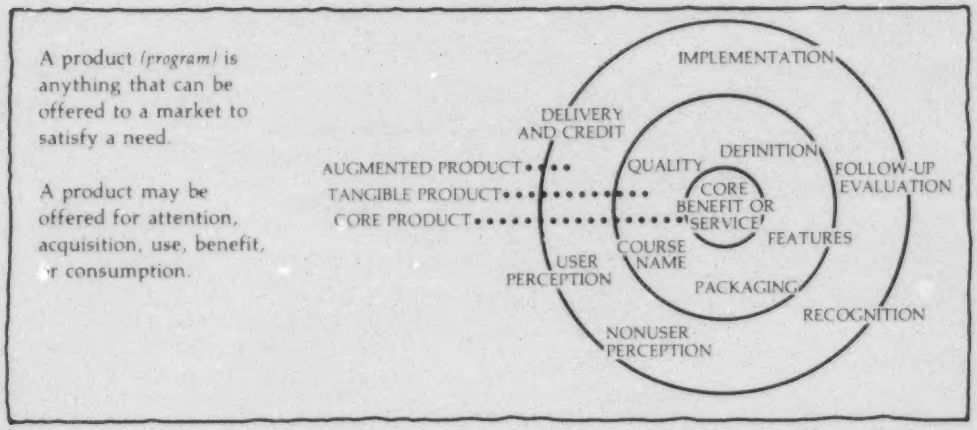

Figure 4. Product levels.

Programs Are Products

A product is a tangible item that can be offered to meet a market need. For higher education, curricular programs are products. We offer curricular programs to meet identified audience needs.

All products have different levels (figure 4).

Core product. The primary benefit or educational service is the product core. This is the central purpose of any educational program.

Tangible product. Surrounding the core product is the tangible product. This consists of features unique to the product that relate to the product name (curricular identification), the way the product is packaged (program delivery), its special features or characteristics, and its quality and definition.

Augmented product. Surrounding the core and tangible products are augmented values. These could include implementation (how the product is used to meet needs), recognition (how the product is perceived), delivery and credit (how the product is passed on to the user and how it is identified), user perception, nonuser perception, and evaluation.

It is important, from a marketing point of view, that you consider how your products are perceived by nonusers as well as by users. Often key members of the nonuser audience are more important than the people directly receiving the products. For instance, you may be concerned about how a corporate leader perceives an educational curriculum.

The set of programs a particular school, college, or university offers to the public at any one time is a product mix. Figure 5 describes a product mix for higher education.

Subunits of the product mix are product lines. A group of closely related products, functioning in a similar manner and offered to the same target audience by a college or department, makes up a product line.

Product items are distinct units within product lines that contribute to the product mix. A program, or product, also has distinguishable characteristics.

To effectively market an institution's programs, you need to define, monitor, plan, execute, and evaluate product

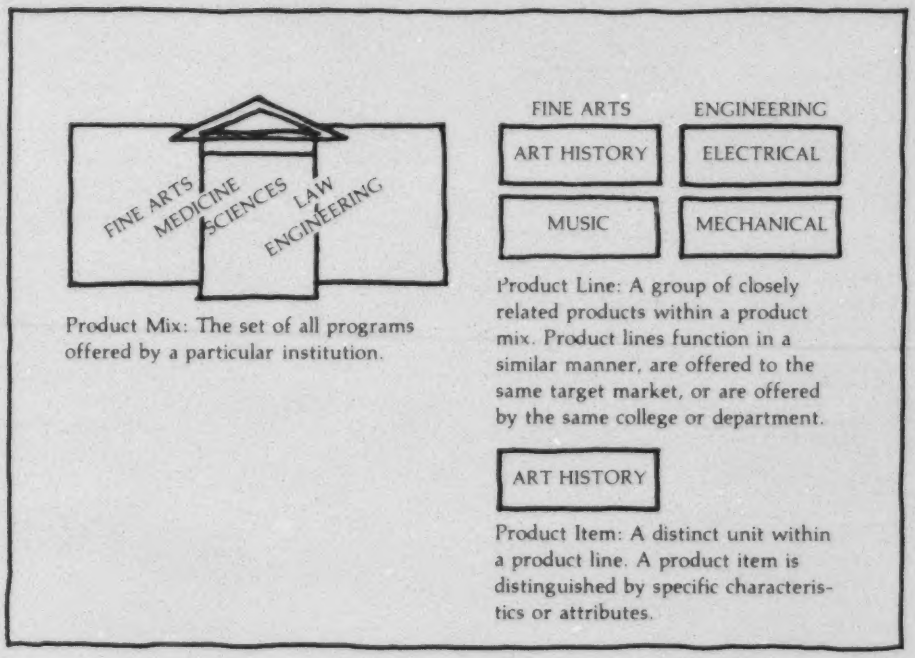
FINE ARTS
MEDICINE
SCIENCES
LAW
ENGINEERING
Product Mix: The set of all programs offered by a particular institution.
FINE ARTS
ENGINEERING
ART HISTORY
ELECTRICAL
MUSIC
MECHANICAL
Product Line: A group of closely related products within a product mix. Product lines function in a similar manner, are offered to the same target market, or are offered by the same college or department.
ART HISTORY
Product Item: A distinct unit within a product line. A product item is distinguished by specific characteristics or attributes.

Figure 5. Subunits of the product mix.

items, product lines, and product mixes. To do this, you must work closely with the faculty because each faculty member influences the related product items and lines that contribute to the total product mix.

The mix is critical and should be a careful balance because, from the user's point of view, the mix helps to form the institution's image.

Case Study

Cranberry College, located in central Massachusetts, was situated on a hill overlooking a peaceful valley. Cranberry had a reputation as a good, all-around college. It wasn't listed in the *Preppy Handbook*, but the *New York Times Selective Guide to Colleges and Universities* gave it a good rating. Cranberry College was located in Cranberry, Massachusetts, a university/college town where education was the primary business. Many at Cranberry College felt it was fortunate that the college name was the same as the town name, because it helped in recruiting and development efforts.

It offered traditional liberal arts courses and, over the years, had built regard for its communications curriculum. It drew students from the Boston, New York City, Philadelphia, and Washington, DC, corridor. Most of its students came from the suburbs of New York City. It did not, unfortunately, enjoy a strong endowment base but relied heavily on income from tuition to meet annual operating expenses. Although it had substantial numbers of alumni, it did not have an aggressive alumni program. Like many small-to-moderate-sized institutions (enrollment was 7,000), course offerings were undergraduate with a few graduate programs.

Cranberry had evolved, over the decades, in a somewhat haphazard way. Courses were introduced as needs became apparent. Faculty played an important role in deciding what new courses would be offered. Not coincidentally, new courses matched new faculty as they were hired. Some departments developed more quickly than others. In many ways curriculum development seemed more closely related to faculty turnover than to planning.

As demographic projections took a turn downward, the college decided to hire an institutional advancement officer. They were fortunate to attract Janet Caulkins. Janet had been trained as an advancement staff member of a larger institution. She had a keen interest in marketing. Her special interest was marketing higher education. She had also done some teaching in the field.

Janet was a sensitive individual, and it was not difficult for her to recognize a growing concern for Cranberry College's fiscal future. Her fellow administrators in admissions, development, and alumni offices described their fears about the future. Janet realized that competition was severe. State-supported institutions could offer education at lower costs. Competition in the Northeast was keen. It seemed an uphill fight to recruit students and build alumni support.

Janet applied some of the marketing principles she had been teaching. She began to meet with key faculty members and key administrators. A decision to hire a market research organization resulted in the development of vital information used in preparing a comprehensive marketing plan.

Janet began to get a good grasp of the products offered by her institution. Specific product items formed product lines. The resulting product mix could be carefully related to clients for admissions, development, and alumni activities.

A comprehensive marketing plan began to emerge. Janet began to see ways she could use the marketing ideas to identify core, tangible, and augmented products. She identified members of primary and secondary audiences. In some cases she realized that a member of the secondary audience could be more important than one in the primary group. She knew, for instance, that she could support development in New York City by using some of the admissions department's efforts.

Ideas she taught in her marketing course became apparent: Cranberry's programs were Cranberry's products! Cranberry's identity could be built on some of the information that was gathered as a result of the market research the consulting firm provided. Janet knew she could use Cranberry's strength in communications (confirmed by market research) and other departments to more efficiently target admissions search mailings.

Janet's marketing efforts paid large dividends. She knew, however, that she could not rest on her laurels. Effective marketing requires vigilance. Janet knew she had to study program developments. Her institution's products were apt to change over a period of time. But, she also knew she was on the road to success. Marketing efforts had paid off.

Work Sheet

Marketing Higher Education

1. List the educational services offered to your clients. What needs do they satisfy?

2. List key members of your audience or constituency. How do they know about your institution? What do they know about it?

3. Identify staff members who are instrumental in communicating your programs to key constituents.

4. What products are you now offering? Plan to offer in the future? Plan to drop?

5. Examine one of your products. What is the core product? What is the related tangible product? What are the augmented values?

6. List current product items. Group them by product line. What is the resulting product mix? How does the mix relate to client needs? How does it influence perception of your institution?

7. Work with faculty and administrators to develop a plan related to anticipated client need, which includes product items, lines, and mixes.

Chapter 4

Market Research

WHAT IS MARKET RESEARCH? It is any kind of research that gives you information about the current state of your particular market and offers guidance in improving your position in that market.

In most cases, it will involve opinion research, employing scientific sampling and interviews or written questionnaires. Educational institutions most often use market research as a way to (1) increase the effectiveness of their fund-raising efforts, or (2) attract more (or better) students.

Even image studies or projects that are overtly intended to solve some immediate problem usually have money or students as their final goal. State and public institutions may direct their fund-raising efforts—and related market research—at legislators, rather than private sources.

Whatever the goal, market research can help you reach it—providing you follow certain rules. The first is to define the goal very clearly at the outset. A clear definition will help you keep the project on track from beginning to end. It will assure that the appropriate groups are sampled; that the right questions are asked; and, finally, that results are analyzed and interpreted in the most productive way.

Careful planning on your part can also help to keep costs to a minimum. Know what you want, then resist impulses to add "just a little more." Add-ons lead to cost overruns—usually big ones. Almost everyone adds on in the course of a study and then is shocked by how far the final cost soared above the original estimate.

Should You Do It Yourself?

There are two basic ways to conduct market research. You can do it yourself, or you can hire someone to do it for you.

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Doing it yourself has several advantages. After all, who knows more than you about your institution's problems and needs? You can call on in-house expertise: marketing professors; statisticians; your own computer center; the graphics, copy, and printing departments in your PR and publications offices; secretarial and clerical staff; and so on. In-house research should be significantly less expensive.

On balance, though, all of these are offset by some major disadvantages. An in-house study often lacks credibility. People both on and off your campus tend to be skeptical about the objectivity of a survey created and analyzed by staff members who may have a vested interest in the outcome.

The in-house team is not likely to view the institution with the detachment you could expect from outsiders. Not being able to see the forest for the trees, the insiders may write questionnaires that do not address the real issues, or, even worse, that serve mainly internal political purposes. Also, inexperience may lead an in-house team to waste much time and effort debating such things as format and wording of questions.

An outside professional firm brings credibility, expertise, experience, and objectivity to the project. But it does so at a price—a high price in most cases.

A compromise arrangement, combining outside expertise and inside cost-cutting services, is possible. The outsiders can be used for such sensitive jobs as sample selection, questionnaire development, and analysis and reporting. The institution provides computer services, printing and mailing, secretarial and clerical services, etc. This can provide professional expertise and credibility at a reduced cost.

Explore Secondary Sources

Once you have defined the problem and decided that a market research study is indicated, you must find the most effective way to go about your study. Before embarking on expensive primary survey research, though, you should explore all secondary sources for the required information. This kind of research often saves time and money. At the very least, it can help you write a more productive questionnaire.

Secondary information sources fall into two categories: external sources and sources internal to your organization. You may find valuable data that has been collected on an

earlier survey, or information that was collected routinely from students or donors. You should explore all internal sources; they will be by far the least expensive.

If internal sources prove unproductive, begin checking external secondary sources. Academic, trade, and professional journals are logical starting places. The federal government is also a rich source of information: the Department of Education, the Department of Commerce (*Business Conditions Digest, Survey of Current Business*), the Department of Labor, and the Census Bureau are four key ones.

Another useful source is the Lockheed *Dialog* data base system, which is a computer-based reference library of scientific, trade, general interest, and governmental publications searchable by keyword. The results of many surveys conducted by or for the government are in the public domain. The *Findex* index of market research cross references most of this information.

Suppose, for example, that you wanted to target the most likely geographic areas for sources of new students. The Census Bureau makes available census demographic information consolidated by zip code. Your applicants for the past two or three years could be overlaid on each zip code. Your computer could then determine statistically the characteristics of the type of zip codes that were the best producers of applicants. Those and all "similar" zips should then be your most productive potential student sources.

Role of Qualitative Research

If the information you require is not available from secondary sources, then you'll need some type of primary survey research. Primary research can be subdivided into two major categories: quantitative and qualitative. Quantitative research yields *numerical* results of some type—counts, intensity, penetration, etc. Qualitative research yields information that is "softer" and is usually not numerical.

Qualitative research is employed most often as the first phase of a projectable, quantitative research project. The purpose of qualitative research is to set the agenda for the subsequent quantitative research.

The most widely employed qualitative technique is focus group research. Focus group research consists of a structured discussion led by a trained moderator in a conference room

setting with five to 12 members of the target universe.

The purpose of a focus group is to elicit from the target universe members their perceptions of the issues germane to the research question. Often, the organization generating the research project has preconceptions about the issues that the research should cover. The key issues within the marketplace, however, may be entirely different.

Suppose, for example, that student applications at institution A showed a significant drop from the previous year and that during the same period the economy experienced a slowdown. A survey at this time would very likely tend to emphasize economic issues and price sensitivity. A few focus group sessions, however, might reveal that, while the economy was a concern, parents and students were looking for a more career-oriented curriculum than institution A offered. Carefully conducted focus group research will help ensure that the quantitative survey research covers all the key issues.

Another important use of the focus group environment is to pretest a questionnaire for use in subsequent quantitative survey research. Walking through a questionnaire with five to 12 members of the universe that will receive the survey can prevent expensive errors. It will ensure that everyone understands the questions, that the questions are not ambiguous, and that jumps and skips from one question to another can be followed. And, because fixed-choice questions should be used as much as possible (and open-ended questions avoided), you can guarantee that all possible responses are included on the questions.

You should avoid at all cost the tendency to read more into the results of qualitative research than is really there. Because focus group results are based on the opinions of very few people, they are not projectable to the target universe. Results of such research are perfectly adequate for defining the issues and pretesting the questionnaire, but only for these purposes. Rarely, if ever, are qualitative research findings reliable in and of themselves for making marketing decisions.

Quantitative Research

Qualitative research usually leads into a quantitative research phase. Quantitative research can be divided into two categories: projectable research (called "probability research" from here on) and nonprojectable quantitative research. As the

names implies, probability research results can be projected to the target universe with known precision. Because nonprojectable research is conducted with a convenience sample instead of a random "probability" sample of the target universe, you can't generalize from the numerical results.

One type of nonprojectable quantitative research is carried on at a central site. "Mall intercepts" comprise the most common type of central site research. Market research companies are now in many regional shopping centers across the United States. The companies contract to conduct surveys among shoppers in the shopping center. Trained interviewers recruit and screen potential respondents in the public mall areas—not in the stores. Short surveys may be conducted on the mall floor. For longer interviews, the respondents are taken to an interview room.

As opposed to focus group research, nonprojectable quantitative research can yield actionable marketing information. For example, suppose your admissions staff had ideas for two different brochures directed to the parents of potential students. With mall-intercept research, the most effective of the two brochures could be reliably determined with minimal expense. Of all the adults approached in the mall, only those with college-bound high school students would be interviewed. Qualified respondents would be asked to rate each brochure separately and then to pick their favorite. (Half would be shown brochure A first, half would be shown B first to control for what is called "ordering effects," a reaction based on the order in which people encounter things.)

These results would be sufficiently valid for selecting the most effective brochure. It may even be desirable to find the "best" brochure for different cities, e.g., brochure A may be better in Denver, while B may work better in Miami.

Central site research has several advantages over other types of quantitative research: (1) it can be completed in a relatively short time; (2) it is relatively inexpensive (provided that the screening criteria are not too restrictive); (3) visual props can be easily employed, in contrast to mail and telephone surveys; (4) large amounts of information can be collected; and (5) complex questionnaires with involved skip patterns can be used because the respondent does not have to contend with following the questionnaire.

As in qualitative research, one must avoid reading too much into nonprojectable quantitative research. While adequate for answering many controlled experimental questions—

as in the above example—results may not reflect the views of the target universe on sensitive issues.

Projectable or probability quantitative survey research yields results that can be projected to the target universe with a known precision. The three types of probability survey are mail, telephone, and personal (or in-home) surveys.

Each type has particular advantages and disadvantages, usually involving project cost, turnaround time, potential biases, and data volume capacity. For any given project, the constraints of the situation usually mandate one of the three techniques. Before examining each technique in detail, let us briefly examine sampling and questionnaire design.

Sampling

The device that makes projectability possible is proper sampling. The purpose of sampling is to obtain information that is representative of a universe while examining only a portion of that universe. You should carefully target the universes to be studied. Don't sample the general public if your purpose would be better served by a survey of opinion leaders or of parents of students. Some other likely targets: alumni, faculty, students, prospective students, those who applied to your institution but attended another, school counselors, legislators, donors, and media "gatekeepers."

Compared with taking a census, sampling has several advantages: (1) it is significantly less expensive; (2) it is faster; (3) it is more accurate (paradoxically); and (4) it allows time to collect more in-depth information.

Sampling has two disadvantages. First, information is not collected on everyone. (Sampling could not be used to calculate electric bills.) Second, sampling "error" is introduced. Sampling error arises because not everyone is measured; it is the price paid for using a sample. However, the size of this sampling error, which depends upon the sample size, is known; it is referred to as the "precision" in table 1.

In most cases, proper sampling means simple random sampling. That is, every member of the target universe has a known and equal chance of being included in the survey sample. In practice, systematic sampling is an adequate substitute for simple random sampling.

Systematic sampling is also known as nth name sampling because the total universe (i.e., population) size is divided by the desired sample size to yield the increment, or n, to be used. For example, if you want a sample of 400 from a universe of 4,000, you will need to sample every 10th person. But don't start automatically with one and go to 10. From a random number table (or by drawing numbers from a hat), select a random number between 1 and n inclusive, which is 10 in this case. Let's assume that number is six. From a list of the universe, select—or have your computer select—the person corresponding to this random number—the sixth person—as the first member of the sample. Subsequently, select sample members by taking the nth (10th in this case) name from the first selected name.

The precision of the results is determined by the size of the sample and the size of the universe. Table 1 is a guide for determining adequate sample sizes.

Table 1 is based upon a 95 percent "confidence level." That is, the sample size is calculated to ensure that the true universe value of a measured variable is within the range "measured value plus or minus precision" 95 percent of the time. Suppose you conduct a survey using a sample of 370 from a universe of 10,000 alumni, and find that 80 percent of your sample would recommend your institution to a college-bound student. You could be confident that, 95 times out of 100 times, from 75 to 85 percent of the entire universe holds this opinion. In doing surveys for your institution, you would probably want to hold the precision level at plus or minus 5 percent.

Table 1. Choosing Adequate Sample Size

Total Size of Group Studied (Universe)	*Sample Size Required*	
	Plus or minus 5% Precision	Plus or minus 10% Precision
100	79	49
500	217	81
1,000	278	88
5,000	357	94
10,000	370	95
50,000	381	96
100,000 plus	384	96

NOTE. See text for discussion of the tradeoffs between sample size and response rates.

Please note that you need the number of responses listed in the table. You must also remember that you should generally get at least a 50 percent response rate to your survey. That means you would have to double the sample size shown on the table to determine the number of questionnaires that you would send. (Both factors are vital: the sample size and the response rate. For a universe of 10,000, you would need to send out 750 questionnaires, assuming a 50 percent response rate, to get a sample of 370. You couldn't send out 1,480 questionnaires and be satisfied with a 25 percent response rate, even though you would receive 370 completed responses.)

If you need to make statements about subgroups of the sample with precision equal to that of the sample as a whole, the sample size for each subgroup must be determined separately from table 1. In effect, a separate survey is conducted for each subgroup. This is called stratified random sampling. When the survey results are being processed by computer, care must be taken to weight each subgroup back to its proportionate size in the universe at large. You will need some expert help from your computer people on this.

If the response rate is too low, a significant potential for error is introduced. The error is called nonresponse bias. If 70 percent of the sample does not respond to the survey (i.e., a 30 percent response rate), there could be something about the 70 percent that makes it different from the 30 percent that responded. For example, suppose a survey on gun control was mailed to a random sample of the United States population. Suppose further that people opposed to gun control do not like to answer surveys. The results would indicate much stronger support for gun control than really exists in the population as a whole, because the nonrespondents as a group were more opposed to control than those who responded.

If you are familiar with the universe being surveyed and it is relatively homogeneous, a 40 to 45 percent response rate is adequate, provided that the demographics of the respondents match known demographics of the universe. If there is any uncertainty about the overall mix of your universe, you should aim for a response rate of 65 percent or more. You can achieve a response rate of this magnitude cost effectively by careful application of the techniques described by Dillman in *Mail and Telephone Surveys: The Total Design Method.*

Questionnaire Design

Along with sampling, questionnaire design is a most important consideration in conducting a survey. The objective of questionnaire design is to develop a questionnaire that will reliably collect the needed information without deterring or offending respondents.

Parsimony should be a guiding rule in developing a survey. Ask no unnecessary questions; the respondent's time is valuable. By wasting it, you risk reducing your response rate. For each question suggested for a survey, you should ask: "Is there some action I can take based on the answer to this question?" If the answer is no, omit the question.

Question wording is more an art than a science. Common sense is your best guide. An excellent reference for writing questionnaires is Payne, *The Art of Asking Questions*. In Chapter 14, "A Concise Check List of 100 Considerations," he gives many tips, including the following:

- use simple words
- do not be vague
- keep it short
- be specific
- do not talk down to respondents
- avoid bias
- avoid objectionable questions
- do not be overly specific
- avoid hypothetical questions
- do not ask two questions at once
- use words that will be uniformly understood
- do not use abbreviations or unconventional words and phrases
- avoid double negatives
- use mutually exclusive response choices
- do not assume too much knowledge by the respondent
- make sure that information in questions is technically correct
- provide time referrents if necessary
- try to use questions comparable with existing data

Use fixed-choice responses in every possible situation; avoid open-ended questions as much as possible. The response choices should be exhaustive and mutually exclusive (focus group information and pretesting are useful here). Scaled-question responses (i.e., 1 to 5) should be anchored on each end with a descriptive phrase (in this case the anchors

could be "very important" for 1 and "very unimportant" for 5). Intermediate scale points may or may not be anchored, but there should be a neutral center point.

On mail surveys or any self-administered survey, avoid complex skip patterns. They tend to confuse the respondent and can lead to lower response rates.

Order questions according to their importance in terms of the survey's goals, with the most important first. Group questions similar in content together. Order content groups along some line of logical linkage if possible. Within a content area, position more objectionable questions toward the end of that section. Place demographic questions at the end of the questionnaire.

With careful planning, you can minimize the cost of entering your survey's data onto computer cards. The choice codes the respondents mark can be the codes punched into the computer. For example, mail survey respondents could be instructed to circle the number corresponding to their response, with the responses printed as YES...1 NO...2, etc. The 1's and 2's, as marked by the respondents, would be punched into the computer.

If possible, the data card number and column position should be unobtrusively placed beside each question in small type (or beside every 8th or 10th question is adequate). Again, though, keep your focus on the respondent. If precoding is likely to confuse or deter the respondent, don't do it—hand code the completed questionnaires.

Precoding can be done with all types of questionnaires. A questionnaire administered by an interviewer can carry more detailed precoding because the respondent never sees it. But keep precoding unobtrusive on self-administered questionnaires. Be sure to seek the advice of those who will perform the data entry and computer tabulation for general coding guidelines and for answers to any specific questions.

Mail, Telephone, and Interview Surveys

Mail surveys. Let's start out by examining in detail mail surveying. Perhaps the biggest advantage of a mail survey is cost. Despite the unrelenting increase in stamp costs, mail remains the cheapest way to administer a questionnaire. Mail surveys have other virtues, too. They are delivered into neighborhoods that interviewers may be hesitant to enter.

The questionnaires may be answered by any specified member of the family at a time convenient for the respondent. Also, respondents often answer questions by mail that would otherwise be embarrassing to them.

The chief shortcoming of mail surveys is the possibility of nonresponse bias, as mentioned above, because of a low response rate. Some subgroups of the sample might not be as likely to respond as others. For example, middle-aged white women could be greatly overrepresented, while young black men might not be represented at all.

You can use follow-up mailings and incentives to avoid a low response rate. Typically, you should send a reminder about three days after the questionnaire mailing. Then send a second questionnaire mailing two weeks later.

Small monetary incentives help boost response by making the addressee feel obligated to you. Other gifts, such as calculators or books, can be equally effective. As a representative of a college, you may consider this inappropriate. So consider a concert ticket or even a football schedule. Good cover letters, first-class outgoing postage (stamps are better than metering or indicias), and postpaid reply envelopes also result in higher response rates.

Telephone surveys. Surprisingly enough, you can use rather complex questionnaires and collect large volumes of data by telephone. Most people will consent to interviews of one-half hour and even longer, providing you catch and hold their interest.

The chief strength of telephone surveys, though, is speedy delivery of results. You can have information in hand within hours after completing calls.

Personal interview surveys. In theory, at least, the personal interview survey is not subject to nonresponse bias. The response rate can be 100 percent. Actually, it isn't. Interviewers do not find people at home or they purposefully avoid unpleasant neighborhoods. Even so, true response rates in excess of 80 percent are not uncommon.

Personal interviews also permit use of long, detailed questionnaires and follow-up questioning where needed. The interviewers can explain questions if necessary. Sessions lasting for an hour or even longer are not unusual. Visual props may be used, and the interviewer has an opportunity to explain anything that may confuse the respondent.

On the negative side, an unskilled interviewer may affect the nature of the response by unintentionally cuing the respondent with his or her opinions. Cues can take such forms as tone of voice, inflection, facial expression, or leading probes. In addition, respondents may be reluctant to answer sensitive or embarrassing questions in the presence of a stranger.

Cost is, by far, the chief drawback in this type of survey. One can easily spend $100,000 or more on a relatively simple project.

Dickinson College greatly reduced survey costs by having a group of trained student interviewers on campus. The students, who had been trained and used by a national polling organization in connection with the Three Mile Island incident, volunteered their services. Few institutions are that fortunate.

Table 2 summarizes the major advantages and disadvantages of the various types of quantitative research.

Table 2. Comparison of Four Quantitative Survey Methods adapted from Kress, 1982, p. 108)

Criteria	Mail	Telephone	In-Home	Central Site*
Handling complex questionnaires	P	G	E	E
Collecting large amounts of data	G	G	E	E
Collecting "sensitive" information	G	F	F	F
Using visual props	F	P	E	E
Controlling interviewer effects	E	F	P	P
Controlling sampling	F	G	E	n/a
Time required to complete project	P	E	F	E
Typical response rates	F	F	F	n/a
Cost	G	G	P	G

* Key: E-Excellent G-Good F-Fair P-Poor
n/a-not applicable

Managing the Project

Good management of the survey guarantees not only timely completion of the research project but that you will keep the price down. Early on, prepare a schedule with the major project milestones. These milestones include: the problem defini-

tion or goal, draft questionnaire, final questionnaire, sample specification, mail date or date to begin field work, cut-off date, data entry completion, tabulation completion, draft report, final report, and implementation plan.

The schedule should be realistic; good research takes time. If you need fast results, use a faster research technique such as telephone; don't try to hurry a slow technique like mail. Once a schedule has been agreed to by all parties involved, stay on it.

Good quality control in any type of market research is mandatory. Even a seemingly small error, such as a typo on the questionnaire sample group key, can completely invalidate all of the results of a very expensive project. Check and double check each step along the way. Use the milestone schedule as a check list. If any step feels the least bit loose, revise your procedures to tighten it up. Maintain an abiding faith in Murphy's law: if anything can go wrong, it will.

Set up a system for handling and controlling completed questionnaires. Scan each one for obvious errors. When tracking individual respondents, log responses by day. Initiate additional mailing waves or telephone call-backs as necessary to control the response rate. Number all completed questionnaires and enter that number as part of the computer data.

Prepare an extremely explicit and complete set of coding instructions, even if you are coding the responses yourself. Code replies to open-ended questions based on a content analysis of the actual responses. (Again, avoid open-ended questions whenever possible.) The coding instructions should include several samples of coded and punched questionnaires.

The next step is getting the data keypunched onto cards or directly into the computer. This is best done by an in-house data entry department or a commercial data entry house. If at all possible, the project budget should include funds for key verification of the punched data. (Key verification is a second keyboarding of the data wherein the originally punched data is checked character by character.)

The preliminary computer runs should be "cleaning" runs looking for incorrect or illogical responses. All suspect responses should be checked against the source questionnaire. Several incorrect responses on one questionnaire probably indicate an insincere respondent; that case should be deleted from the analysis. If you used stratified sampling, responses will probably have to be weighted to represent their proper proportion within the universe.

Once the data have been cleaned, the computer tabulation can begin. The purpose of the tabulation is to tease from the collected data the information that addresses the research questions, and any unanticipated useful information. Statistics are a means to this end, not an end in themselves. Most colleges and universities have access to statistical packages such as SPSS or SAS. These or similar statistical packages are mandatory for performing the necessary tabulations, but they can be a little difficult to use. For the tabulation, you should seek the assistance of an experienced market research faculty member and your computer center.

Statistical techniques typically employed are frequencies, averages, cross-tabulation, breakdown, analysis of variance, regression analysis, and more complex segmentation techniques such as factor, discriminate, and cluster analyses.

Always prepare a final report, and present it in clear, nontechnical language. Major findings and recommendations should be up front, on page one of the report. Be careful that personal biases do not creep into reports. Avoid "bad news only" reports, too. The research data almost always suggest remedies for problems; these should be included along with the bad news. In short, the report should be an action document, not a scholarly paper.

It must be complete, however. Include details on the sampling methods employed, response rates, mailing or interview schedules, and demographic breakdown.

Planning at the outset and implementation of results at the end are both critical to the success of market research. The more detailed the plan, the more likely you are to get usable results at an acceptable cost.

Implementation is the most important step of the entire process, but it sometimes does not happen. For one reason or another, the final report gets filed away and never fully used. Market research is perishable; if it isn't acted upon immediately, it becomes dated.

Market research is also on-going. You should conduct follow-up research to ascertain whether actions taken as a result of the original study did, indeed, solve the problems. Market research is an integral part of marketing; make it a way of life—not just an event.—CGP and JSF

Case Study

Pennypack University, a land-grant institution, had a three-fold mission of teaching, research, and extension. As the administrative base for Cooperative Extension, it supported an extensive educational delivery network with offices and agents in every county in the state. Research by Pennypack faculty formed the basis for educational programs, and county agents delivered the programs to the public. Cooperative Extension has been active for many years. It began as agricultural education for farmers, but during the last few decades it added educational programs in youth development (4-H) and home economics. Cooperative Extension has three sources of funding: federal, state and local (county).

Bob Neilson was assistant director for Cooperative Extension at Pennypack, with an office in the ag college administration building. He had been an entomology major in college but his interests were eclectic. He recently discovered marketing and was particularly interested in market research and began to read about it. In fact, he became so involved that he began work on his master's degree in the college of business with a focus on market research.

Things had not been going well for Bob and his colleagues. The director was concerned because Cooperative Extension had been losing local funding. One county in particular decided to cut back. Cooperative Extension's director told Bob that county officials were interested in funding agricultural activities but could see no reason to fund youth and home economics programs. In fact, they said their constituents were not interested in those programs. They planned to cut two-thirds of Cooperative Extension's county funding. The director told Bob she wished there was some quick way to discover whether there was or was not a demand for youth and home economics programs.

Could market research be used to verify to county officials that there was a need for youth and home economics programs? Maybe Bob could contact past participants in youth programs. He wasn't sure of their names and addresses. He remembered that agents in that county had been so busy with program activities that they had not developed a good record-keeping system. Besides, he wasn't sure that county officials would be influenced by past performance. How could he determine if constituent needs existed now?

Bob began by identifying a market research firm that had experience working with educational institutions. Bob helped the firm design a telephone survey instrument. The survey

would measure county residents' attitudes toward Cooperative Extension.

One month after the survey had been completed Bob reported his findings at an administrative staff meeting. He described the market research process, how the market research firm had carefully helped to gather data, how the findings had been analyzed, and how he had prepared a presentation for county officials. Bob's market research project pinpointed two things: there were needs for youth and home economics programs and there was outstanding recognition of past programs in all program areas. County officials were impressed. A unanimous vote guaranteed funding (and a possible increase). Bob had effectively used market research to measure client needs. He had also convinced others that market research was an important and helpful tool.

Work Sheet

Market Research

1. Think about (and discuss with others) ways that you can use market research to solve problems. Develop a list of problems and priorities.

2. Do you (and your institution) have the skills and capabilities to engage in effective market research studies? Should an outside professional firm be considered? Discuss these questions with others.

3. List secondary sources for market research information.

4. How can qualitative and quantitative market research help solve your problems?

5. What sample size should be used?

6. Think about a market research survey instrument. Who should develop it? How will it be pretested?

7. What are the advantages and disadvantages of the various forms of surveys (mail, telephone, personal interview, and central site)?

8. Who will be responsible for managing your market research project?

9. What plans can be implemented as the result of your market research findings?

Chapter 5

Audience Segmentation

By audience segmentation, I mean subdividing the population into homogeneous subsets of target audiences. This helps an institution of higher education to better describe and understand a segment, predict behavior, and tailor messages and programs to the specific needs of each subset (see figure 6).

Because any marketing strategy has physical and economic restrictions, we need to find ways to ensure that programs and communication efforts reach the people we want to reach.

Target Marketing through Audience Segmentation
1. Identify needs
2. Identify market segments (geographic, demographic, psychographic)
3. Match product and communications to market segments
4. Develop marketing mix for each product and each audience segment
5. Deliver product
6. Evaluate
7. Identify new needs

Variables in Audience Segmentation
1. **Geographic**
Region
County size
Urban-rural
Population density
Climate
2. **Demographic**
Age
Sex
Family size
Family life cycle
Income
Occupation
Education
Religion
Race
Nationality
3. **Psychographic**
Social class
Life style
Personality

Figure 6. Audience segmentation.

Target audiences can be segmented:

- *demographically* (e.g., age, sex, education, family life cycle);
- *geographically* (e.g., southeastern county area, rural, north side of town); and
- by a variety of characteristics called *psychographics* (e.g., personality, life style, usage patterns, risk factors, benefits sought).

Audience segmentation allows us to define more accurately groups with similar needs and to define more precisely which communication channels will reach each group.

In higher education, audience segmentation has many benefits. For example, it helps marketing people to:

- identify clients
- deliver educational programs more effectively
- cut costs by targeting programs and communications
- survey and identify needs
- evaluate curriculum
- determine messages and appeals
- develop strategies
- develop and implement an appropriate *marketing mix* designed to satisfy the chosen market target.

A college or university should be sensitive to its many target groups. These people have an actual or potential interest or impact on the organization. Many target groups may influence an institution of higher education.

- alumni
- general public
- prospective students
- current students
- parents of students
- faculty
- trustees
- suppliers
- foundations
- local community
- mass media
- high school counselors
- administration and staff
- competitors
- business community
- government agencies

These segmented groups include internal constituents (faculty, staff), external groups supporting the institution

(alumni, foundations), groups using the institution's services (students), and groups regulating the institution (government agencies).

The modern institution operates in four markets:

- the educational market
- the research funds market
- the contributions market
- the products and services market.

Each market requires thoughtful and coordinated marketing management.

Once you identify the target audience, you must decide what response is expected. The ultimate response an institution looks for, of course, is a commitment to the institution. But commitment is the result of a long process of client decision making. The institution needs to know where the target audience now stands.

A current or potential client may be in one of six stages with respect to an organization: awareness, knowledge, liking, preference, conviction, or commitment. Let's examine each state of mind.

1. *Awareness.* How aware of the institution is your target audience? The audience may be completely unaware of your institution. The audience may or may not recognize its name. Or the target audience may know something about your institution. If most of the target audience is unaware, your job is to build awareness—or perhaps even name recognition. This calls for messages repeating your institution's name. It calls for constant repetition at every available opportunity in every available way—speaking, writing, printing. Building awareness takes time and requires constant effort, especially when communications are directed to new audiences or when old audiences change.

2. *Knowledge.* The target audience may be aware of your institution but may not know much about it. What is it? What does it do? How can it help me? An effective communications response to this situation is to transmit key information through various forms and media. An image perception is important. This image needs periodic testing to determine its accuracy.

3. *Liking.* If the target audience knows about your institution, the next question is, "How do they feel about it?" Imagine a scale:

   - dislike very much
   - dislike somewhat
   - indifferent
   - like somewhat
   - like very much

   If the target audience views your institution unfavorably, you need to find out why and develop communications that will create favorable feelings. If, of course, the unfavorable view is rooted in real inadequacies of products (i.e., curricular programs), a communications campaign will not do the job. The job then is to improve activities and communicate their qualities. Effective marketing calls for "good deeds followed by good words."

4. *Preference.* The target audience may like your institution but may not prefer your services to others. Your services may be among several others acceptable to the client. In this situation you need to promote your institution's quality, value, performance, and other positive attributes. You can check success by measuring or surveying the target audience to see if the preference for your institution has changed.

5. *Conviction.* A target audience may prefer your institution but may not develop conviction. It's your job to convince the target audience. Building conviction is a difficult task. It requires the coordinated efforts of administration, staff, and faculty.

6. *Commitment.* A member of the target audience may have conviction but may not be committed and ready to participate. He or she may be waiting for additional information, may plan to act later, and so on. A communicator's job is to lead the client to take action. In the commercial sector, this would be called closing the sale. This is the final step in client acceptance.

The six stages can be grouped into subgroups:

- cognitive (awareness, knowledge)
- affective (liking, preference, conviction)
- behavioral (commitment).

We can assume that our target audiences pass through one or more of these stages. Our job as effective marketing specialists is to identify the stage most members of the target audience are in and to develop effective communications that will motivate them to take the next step.

Case Study

Mountainview University was a private institution that was finding it difficult to compete with lower-cost state institutions. Mountainview was located in a valley in the southwestern United States. The beautiful Santa Ana mountain range hung like a stage set behind the campus. Its curriculum was what you would expect of a private, southwestern university—a strong focus on history and on languages. Many of its students were first- or second-generation Mexican-Americans. Many of the campus buildings had red tile roofs, characteristic of Spanish influence.

The mailing room was located in the administration building basement. Laura Linkletter, the advancement officer for Mountainview, frequently was found working at a small desk behind the Addressograph machine. Part of her responsibility was the maintenance of mailing lists used by her office, admissions and development, and the president's office.

When Laura took the job she discovered that the mailing lists were in very bad shape. Some were out of date. (She could tell because they had the old zone numbers.) She took the responsibility of finding ways to organize the lists. She had plans to convert the archaic system to a computer information base. In the meantime, she purged the lists of old addresses. She developed a code system that would break the lists down by demographic and geographic information.

When the development officer described a major capital campaign Mountainview was about to undertake, it became evident that much of Laura's efforts to refine the lists would bear fruit. The development officer described direct-mail components he wanted to send to alumni. He described a campaign case statement he wanted to send to corporations to "prime the pump." He described regional meetings that would be organized to tell the university's story through a multimedia slide show. He wanted to be able to create, write, design, and deliver university information to specific audiences. In fact, he lamented over the "old days" when development efforts were "a heck of a lot easier." He described how his office would produce a campaign booklet and simply use the mails. (Laura thought about the problems of escalating mail costs. A recent mailing to alumni cost almost $1,000.)

Within the next few months Laura helped her friend in development with many mailings. He was delighted that Laura's mailing lists were accurate and could be used to

segment mailings. He was happy to write a memo to the chancellor describing Laura's help in the successful development campaign.

Work Sheet

Audience Segmentation

1. Select a current curricular program (product). Segment your audience. Describe your audience segmentation techniques.

2. How will a low birth rate affect your institution?

3. List the demographic characteristics of your target population. How do these match current programs? Planned programs?

4. How are your audiences changing?

5. How does audience segmentation relate to curriculum? Admissions? Development? Alumni programs?

Chapter 6 Image

IT IS AN INSTITUTION'S IMAGE, not necessarily its reality, that people respond to.

An organizational image is the aggregate or sum of perceptions, attitudes, ideas, beliefs, and feelings that people have about the organization. Some marketing specialists maintain that image is more important than reality. Professor David Garvin of the Harvard Business School has written:

> An institution's actual quality is often less important than its prestige, or reputation for quality. . . . Perceptions are critical, for quality and prestige do not always move hand-in-hand.

Many things, including outreach materials, media communications, and physical environment, contribute to an institution's image. Administrators, faculty, and staff should be concerned about their institution's image for three reasons:

1. They need to know how their institution is perceived in relation to competing institutions.

2. They need to know how they are perceived by their various audiences—students, alumni, potential donors, and so on.

3. They need to monitor any change in image perception over a period of time.

Seeing Ourselves As Others See Us

We know that images vary, often considerably, from person to person. An individual's beliefs, ideas, and impressions come from various experiences and backgrounds. Differences here result in different perceptions and images of an institution.

People's images also differ in clarity and complexity. Some people have very few or fuzzy impressions about an institution. Others may have distinct, detailed impressions.

Surveys, interviews, and questionnaires can measure client attitudes, or images, of an educational institution and can yield valuable information. Survey results can help faculty and staff plan program strategies, precisely target information, and suggest ways to improve an institution's overall image.

A person's image, perceptions, and behavior form a close relationship. Many marketing specialists say that a school, college, or university can get maximum response from the various audiences it serves by acquiring and maintaining the right image.

We cannot assume what consumers think about us. To plan and develop strategies and priorities, we need to probe consumer needs and perceptions and measure the customer's satisfaction.

Controlling the Ways Others See Us

Princeton, Purdue, Notre Dame, Columbia, UCLA, Cornell, Northwestern, and Smith—just thinking about the words evokes a mental image.

For years we've heard about corporate images: Xerox, IBM, Kodak, General Electric, and McDonald's (registered trademarks). Corporations have hired the best agencies and sought the best talents to create, manipulate, and maintain images. In some cases companies have developed complex manuals to ensure that the corporate image is properly translated into print, radio, television, and other media. Any organization that needs to attract resources (funding and donations) and customers (students) is interested in putting forth its best image. An educational institution can adapt some business concepts to create, change, or maintain its image. Nonprofit organizations are recognizing what corporations have known for decades: that institutions are per-

ceived according to their differences, not their similarities. Educational institutions are placing more and more emphasis on creating images that improve their marketing position: the way they are perceived in relation to competing institutions.

In *Principles of Marketing*, Philip Kotler defines image as "the set of beliefs that a person or group holds of an object."[2] It is important to realize that institutional images are really perceptions. These perceptions can vary from person to person. They can change over a period of time. Marketing people talk about image persistence, the idea that people frequently "see" what they expect to see, rather than what really is. Often there may not be a close relationship between perception (image) and reality.

The profit-making corporate sector has found ways to assess image. This is usually accomplished through surveys, which measure an organization's image in the eyes and minds of its major audiences. Visibility is an important issue. Content is another.

One tool used to measure the content of an image is the semantic differential survey. Words are used to suggest extremes. Key audiences are surveyed to determine image

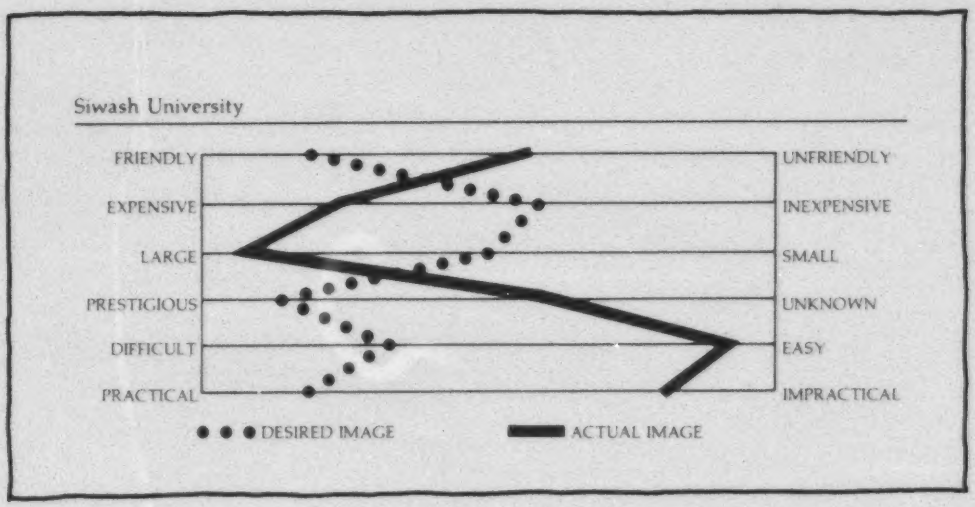

Figure 7. Image content assessment.

2. Kotler, Philip. *Principles of Marketing*. Prentice-Hall, 1980, p. 631.

content. Figure 7 is an image content report, based on a semantic differential survey, for a theoretical institution of higher education. Once an organization has measured an audience's perceptions and determined how people see it, the next step is to define the image it would like to have and work to achieve it.

As universities scramble to develop distinct images there is the potential danger that higher education will adopt questionable advertising techniques. Some commercial organizations attempt to improve their product's position by denigrating another organization's product. An image that identifies the best institutional qualities can be communicated without slandering or judging the competition. Communications can shape and mold an image that is attractive and imaginatively projected, but one that honestly and accurately reflects the institution.

What Contributes to an Institution's Image?

Colleges, schools, and universities should focus on the things people see and hear about the institution.

Newspaper articles, conversations, publications, radio and television reports, a president's speeches, the institution's architecture, the admissions process, location, curriculum, financial aid, tuition, weather, grading systems, registration process, and faculty and staff attitudes all contribute to an institutional image.

I have said that institutions of higher education are known by their differences and not their similarities. In many cases, the images perceived when the name of an institution is mentioned are critical to its survival. Coordination of admissions, development, alumni, public information, publications, and a news service will become more important as an institution works to communicate an image to its publics. Internal perceptions, as well as external ones, also contribute to the collective image. Strengths and weaknesses will be apparent as the institution's image is identified.

Mentally stroll through your campus. Think about its students, its courses, its environment. Talk to others: students, faculty, staff, administrators. How do they "see" your campus? Note the best perceptions. Build on those to create your image.

Case Study

Sweetfield Academy is a prep school located in the green rolling hills of southern New Hampshire. Nearby Owasko Lake provides a nice setting for a school dedicated to the study of the liberal arts, which was founded in the 1890s by a religious organization. Its architecture—an interesting mix of colonial, federal, and Greek revival buildings—reflects its history. Its prestigious alumni include doctors, lawyers, corporate leaders, and industrial executives. Like many private, independent secondary schools, Sweetfield depended on donations to defray operating costs. Indeed, although its alumni were not great in number, they were a dedicated group. It was not uncommon to find many of them driving to campus for homecoming and football games. Many current students were second or third generation Sweetfielders.

Maury MacDonald was the development officer. A Sweetfield alumnus, Maury prided himself on his many contacts in Boston, New York City, Philadelphia, and Washington. He was energetic and eager to find improved ways to seek donations for the academy. He knew the history, traditions, and goals of the institution.

He couldn't quite identify it but he sensed that something was wrong. His predecessor, a graduate of an eastern college, had devoted great energy to producing direct mail to generate development gifts. He was a prolific writer but really didn't understand Sweetfield. He was quick to try new and different ideas to get contributions but operated from a seat-of-the-pants approach. None of his efforts was grounded in any form of market research. He rarely sought advice. He simply cranked out one mailing after another, hoping to capture elusive gifts.

Maury MacDonald attended a summer workshop in communications during his first summer as Sweetfield's development officer. He thought he might pick up some advice about communications. The seminar was lead by an up-and-coming professional communicator from the University of Alabama. The chairman led one session that caught Maury's attention. It was entitled, "Assessing Your Institution's Image." It described how marketing principles were used to measure an institution's image. He described an image audit, that is, a review of all the outreach materials created and used by an institution that wanted to present itself to target audiences. As Maury was taking notes, thoughts of the direct-mail pieces his predecessor used ran through his mind. He remembered that each one was

different. Each presented a different image. Some suggested that Sweetfield was a contemporary institution. Maury thought about the conflicting ideas that were presented by the copy, photos, layout, and design. As the panel members talked, Maury gradually realized that his predecessor did not have a crisp idea about Sweetfield, and the image his materials presented was conflicting and did not accurately reflect the institution. Individually and collectively, his direct-mail pieces presented a picture that did not do justice to Sweetfield as Maury and others knew it. Then and there, Maury decided to meet with his board of trustees, key members of the administration, students, and faculty.

Subsequent development materials were met with great acclaim. Frequently, alumni would comment about the mail they received from Sweetfield. They described the quality and prestige the pieces evoked. And, of course, donations increased.

Work Sheet

Image

1. What image do you want your institution to have?

2. What images of your institution do your clients have?

3. What contributes to your institution's image?

4. How can you measure your audience's image perceptions? How would you change your clients' image perceptions?

5. How do your curricular programs relate to image?

6. What would you use to create an image content assessment? (see figure 7)

7. List editorial, photographic, and graphic design ideas that can be used to promote an accurate and honest image.

8. How can admissions and development and alumni office staff work together to clarify your institution's image?

9. Think of all the tangible items (printed pieces) that represent your institution. Lay them out on a table or floor. What image do they create? Positive? Negative? Are they coordinated?

10. Think of all the intangible items that represent your institution. List them. Are they positive? Negative?

11. Lay out all the admissions materials. How do they

compare with other materials a client receives in the mail? What image do they create? Do the same with development and alumni outreach materials.

12. How can you improve the perception of your outreach efforts?

Chapter 7

Positioning Your Institution

ANY COMMERCIAL, PROFIT-MOTIVATED company is concerned about its product in relation to a competitor's products. This marketing concept is called positioning.

In a classic promotional campaign Avis positioned itself against Hertz with the theme, "Avis is only number two in rent-a-cars, so why go with us? We try harder." Hertz responded with a campaign based on the slogan, "We're number one."

In higher education you should be concerned about positioning. This determines how your educational system is positioned in the nonprofit, educational marketplace. In higher education, positioning indicates how you want your institution to be perceived by the audiences to whom you are directing your appeals.

In the corporate sector, products are identified by their differences, not their similarities. Likewise, positioning describes the differences between your institution and competing organizations.

Positioning relates closely to a client's perception of an institution. You can position your institution by focusing on strengths that you want target audiences to perceive. Once you build a clear image, your institution will begin to occupy a place in the educational marketplace. It will be positioned in relation to competing educational institutions. By creatively using this process, you can position your institution without directly citing the competition.

You must play back to your audience, through a variety of communications efforts, your institution's educational qualities and differences that are most important.

There is a close relationship of position, image, and perception. Every person involved in an institution contributes to the image and, eventually, to the institution's position in the marketplace.

Case Study

The Sisters of the Holy Cross founded Mary Magdalene College for Women, located in central Kansas. Tidy buildings were enclosed with a high brick wall, broken here and there with occasional openings and the impressive gated archway that supported the wrought iron letters spelling out the college name. The college had a reputation as a solid educational institution. It prided itself on providing a balance of religious ideals and a contemporary education for women.

It was funded by the church as well as by tuition payments. Somehow, it had survived the pressures of the 1970s, which forced many similar institutions to become coeducational. Many church leaders (it seemed all were male) had pressured the administration to admit men to the college so that it would remain fiscally solvent. The college resisted, however; it had a strong commitment to the women, past and present, who had enjoyed studying at Mary Magdalene.

Mark Haverford was the director of admissions and public relations. He was a bright young man who was dedicated to the college. He had studied marketing. This led him to the conclusion that there were two ways to look at the fact that Mary Magdalene was a college for women. The most obvious was one that most people would realize. Being a women's college limited admissions. After all, about half the population was male. But the other fact was the one that Mark used to best advantage. He realized that a women's college could have an enormous advantage. He could use that idea to position the college in the educational marketplace. Competing colleges would have a tough time. Mark would find every opportunity to focus on the fact that Mary Magdalene was for women only. He made sure that every outreach publication took advantage of the fact that this was a women's college. He also found, through research, that many of Mary Magdalene's students liked having private rooms in their freshman year. Mark made sure that every publication and other promotional media effort mentioned this fact. He realized that he could position the college in the educational marketplace by using what some had thought a distinct disadvantage. Indeed, the recruitment results proved it. Positioning made the difference.

Work Sheet

Positioning Your Institution

1. How do you position your program activities in relation to competing organizations?

2. Pick a specific curricular program. Identify its special characteristics that can help to position it against competing institutions.

3. How can you use your image to position your institution in the educational marketplace?

Chapter 8

Marketing Strategy: The Four Ps

THE STARTING PLACE for an effective marketing campaign is the consumer. Once you identify a particular consumer group or audience segment, you devise a strategy to satisfy that segment. Although many variables exist, we can classify marketing decisions based on the four Ps:

1. *P*roduct strategy
2. *P*lace or distribution strategy
3. *P*romotional strategy
4. *P*ricing strategy.

Product strategy involves decisions about specific programs. This involves more than the program itself. It considers the product (program) in terms of satisfying all consumer needs in relation to the educational program.

Place or distribution strategy concerns the physical location for program activities. It concerns program offerings in relation to the customer. Some institutions have found, through research, that their physical location may be a key factor in marketing their institution. The strengths and weaknesses of location should be part of your marketing plan. Effective marketing combats a negative image by focusing audience attention on positive attributes.

Promotional strategy involves the various aspects of media, publicity, and public relations efforts for a program in relation to its target audience.

Pricing strategy involves the real and hidden prices the customer has to pay. Some institutions raise tuition so that those with resources pay closer to the real costs of education while others receive discounts in the form of need-based

scholarships. Institutions also need pricing strategies for short courses, use of facilities, and other services.

Effective institutions will develop a four-P marketing plan for each activity. Each program should be monitored carefully because, as with a commercial product, the marketing mix may vary with time and in relations to the customers.

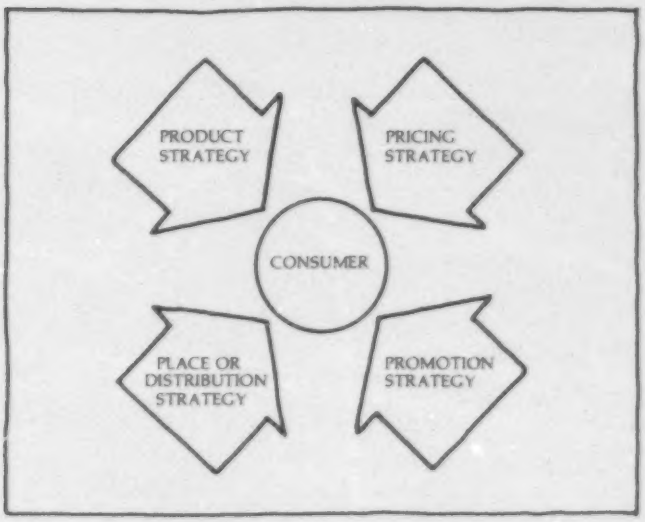

Figure 8. The key to unlocking the marketing strategy door.

Case Study

A large multiversity, ABC University, was located in Manhattan surrounded by the hustle and bustle of a complex megapolis. The pressures of the urban environment weighed heavily on the institution's administration, faculty, and staff. Lack of student housing facilities, transportation problems, a rising crime rate, and all the other ills of an active city were obstacles that seemed difficult to overcome. Faculty, administrators, and staff commiserated with one another about the day-to-day problems. As they began to plan an admissions marketing campaign, there was no doubt that the location was a formidable drawback.

Nevertheless, being the effective marketers that they were, the admissions staff decided to start off with a market survey. They surveyed current students to determine why *they* chose ABC University. Students were selected from various colleges to participate in focus group sessions. The focus groups were led in discussion about why they chose ABC. The results were astonishing! One key reason that came up, over and over, was *location*. Many applicants chose ABC because it was located in the middle of a big city.

Theater majors described the advantages of studying their art and craft in a city with an international reputation for theater. Other students spoke of the rich resources the city provided: libraries, museums, professional organizations, and research facilities. They spoke of the excitement and energy a thriving metropolis contributed to daily collegiate life. Some had come from the Midwest to experience an urban educational environment. There was no doubt that the city was an overwhelming factor in choosing ABC U.

The marketing researchers were surprised. What they saw as a terrible obstacle turned out to be a primary reason for selecting ABC.

How could they take advantage of these results? They decided to change the editorial and graphic approach they had planned for admissions outreach materials. Rather than play down the idea that they were located in midtown Manhattan, they decided to emphasize the location. They created a "campus map" that included all Manhattan. It described the educational resources of the city. They changed the photographs used on the cover and inside the recruiting viewbook. New photos showed students enjoying the urban environment. Focus was on the advantages of a big city. Editorial copy reminded the reader about opportunities in the city.

ABC's marketing staff found out what other effective marketers know. You can't base marketing on assumptions. The most effective marketing campaigns are built on a solid research base.

Work Sheet

Marketing Strategy: The Four Ps

1. Plan a four-P marketing mix for a specific curricular program.

2. Review current programs. List four Ps for each.

3. How could a marketing mix study help you develop a comprehensive plan of work?

4. Have you involved potential consumers in identifying your best program efforts? Outsiders can often provide excellent insights into the four Ps of product, price, place, and promotion.

Chapter 9

Defining Your Institution

A SEEMINGLY LOGICAL PLACE to begin to plan an institution's marketing program is with the mission statement. Traditionally, institutions of higher education have created mission statements, which are editorial attempts to define an organization and its purpose, ideals, and ambitions—its raison d'être.

Unfortunately, many mission statements are poorly prepared. Often these statements are not good beginnings for a marketing program.

An excellent article on this topic appeared in the September 1982 issue of CASE *Currents*.[3] In it the author, Carol J. Guardo, provost of the University of Hartford, tells how to prepare a mission statement that can have strong marketing application.

The best mission statements are carefully written and describe the institution in ways that can be used to position the organization in the educational marketplace. The statements provide the framework for a comprehensive marketing program.

The best statements carefully describe:

1. the academic identity of the institution and its curricular programs
2. the institution in relation to other institutions
3. the educational philosophy maintained by the institution

3. CASE *Currents*. September 1982. "Defining the Mission of a University," pp. 24-27.

4. specific educational aims in relation to target markets

5. educational purpose of the institution.

Most mission statements are created by people who have had little marketing experience, and they tend to be written with broad philosophical and ethical objectives. Often one institution's mission sounds like another's (even if the institutions are quite different, with curricula developed to serve very different audiences).

Case Study

The Rockland College of Criminal Justice was located in the suburbs of Miami, Florida. Its courses were designed to train law enforcement officers. Its curriculum appealed to working police officers and to students who wanted law enforcement careers. Many courses were offered at night as a convenience to people who worked during the day. The college's setting was less than beautiful. Most of the classes were held in converted warehouses. Despite that fact, the classrooms were nicely carpeted. Classes were fun because almost every student had an interest in learning or improving her or his knowledge of criminal justice. Some of the courses in sociology were very difficult. One, in particular, was taught by a faculty member from a large university. She had done research in criminal justice and was an interesting teacher.

Administrators at Rockland recognized the need to develop a precise mission statement to effectively market Rockland College. Rockland did a lot of promotion on radio and occasional television spots in the Miami area. A printed tabloid described the college and listed its course offerings. Mailing lists were purchased from commercial sources. Current police officers and high school students who indicated an interest in law enforcement were the primary recipients.

The mission statement was very important because some felt that communications materials were not as effective as they could be. Often the real character of the institution was lost in all the other editorial and procedural information that was necessary.

A blue ribbon committee was established to determine and describe Rockland's mission. Key members were faculty, current students, graduates, board members, and community leaders. At first it seemed simple to describe the institution since its character was unusual. There simply were not that many colleges of criminal justice around. As the committee continued its work, it became evident that the mission statement was not an easy job. The committee decided to interview representatives of its constituency. From information gathered from these groups, an accurate mission statement evolved. The identity of the institution and its curricular programs became evident. Its philosophy and objectives could be used to position Rockland against other institutions. Although few institutions offered majors in criminal justice, some offered courses that competed with Rockland. The mission statement carefully described the educational aims in relation to target markets.

The resulting mission statement was very helpful because it was a guide for people who prepared outreach materials for Rockland. The committee agreed to a periodic review of the mission statement to ensure its accuracy as changes in the institution occurred. Almost everyone agreed that the mission statement would provide an excellent framework for current institutional advancement as well as for future endeavors.

Work Sheet

Defining Your Institution

1. What is your institution's mission statement? Analyze it carefully. Does it contribute to your marketing plan?

2. Describe target audiences in relation to your mission statement.

3. Based on your mission statement, how can you position your institution in relation to competing institutions?

4. How does the curricula described by your mission statement actually relate to student needs?

Chapter 10

Making a Mark in Education

A STRANGE AND MYSTERIOUS DISEASE often afflicts those well-meaning, inexperienced individuals who embark on marketing ventures for higher education. It's a disease I call "logo-itis."

Institutions of higher education have traditionally been blessed (or cursed) with identifying symbols, marks, seals, or logos. These are usually graphic devices that include the institution's name, often Latin words or slogans, date of founding, and other heraldic devices. Because they have been used for many decades, most symbols do not necessarily represent the institution's contemporary goals, missions, and objectives. Many are graphically ornate, complex, and do not communicate easily and clearly. Also, many institutions have a proliferation of logos. Each subunit attempts individual identity, often at the expense of the parent institution. Opportunities for consistency are lost.

Inevitably the inexperienced but zealous educational marketers turn to the institution's logo as a key part of the marketing plan. Understandably, encouraged by the success of Coca-Cola, Volkswagen, and IBM (registered trademarks) symbols, the marketer smitten with "logo-itis" decides that using the collegiate symbol will guarantee recognition—and eventual marketing success.

We need to understand that there are many kinds of graphic identifying marks or logos. Some are literal and easily communicate the organization's name (identity). Others are abstract and only through constant and expensive mass media exposure do they become familiar to the general public.

Here are some registered trademarks, ranging from easy communicators to complex symbols.

seal An organization's name or group of words organized into a graphic form (an easy communicator).

monoseal An initial or monogram suggesting the corporate name.

monogram Initials or letters rendered in a distinctive manner (fairly easy communicator).

signature An organization's name rendered in a consistent manner (easy communicator).

alpha graphic A mark formed around a letter or letters that illustrates an organization's service (fairly complex communicator).

pictographic A mark that illustrates a company's service or areas of competence in a more abstract way (a complex communicator).

abstract symbol A purely aesthetic abstract device designed to evoke a feeling about the organization. Constant repetition, supported by related copy, music, or slogans, is necessary to gain wide public recognition for the abstract symbol (a very complex communicator).

As we examine these corporate prototypes we can place an educational institution's logo or symbol in one of the various classifications. Each visual device has its advantages and disadvantages. Some are so abstract that, without related typography that clearly identifies the parent organization, very little is communicated.

Before you succumb to "logo-itis," field test your identifying mark. Is it communicating vital information? Is it clearly identifying your institution?

Case Study

Macro State University was the kind of large state university people always imagine. Its student body counted well into the thirty thousands. It was so large that the institution had developed a separate college for incoming freshmen to help them adjust to the size of the university. The university was a city unto itself. The campus was located in Chicago, Illinois. It was ringed by all sorts of support enterprises: fast food establishments, printing services, clothing stores, bookstores, fraternity and sorority houses, and shops of all sizes and descriptions. On any day of the week thousands of students gave the campus the feeling of a beehive of activity.

A walk around the campus (because of its size, much of the campus was closed to vehicular traffic) gave you the impression of what a super-large state university was really like. Just reading the signs on the buildings gave you the impression that this was a complex institution. Indeed, the campus telephone directory seemed the size of the Manhattan white pages.

Fred Vulnerable was the Macro State University director of publications and assistant director of public relations. He was known to be an aggressive leader. His wife thought of him as a workaholic. It was not uncommon to find Fred working in his office on the weekend.

Fred had come from a small private college in Michigan. There, he had been able to exert substantial control over the college's printed materials. It was a different story at Macro. There were so many people involved in producing publications that it seemed an impossible task to control the way things looked. It almost seemed that a comprehensive approach was impossible. However, Fred was an advocate of marketing. He knew that the university needed to develop a cohesive look to market itself effectively. Fred attacked the problem by studying the logos that represented various units of the university. It seemed that everywhere Fred looked he saw a different symbol. He collected every symbol he could find. Without much effort, he soon had a collection of more than 50 logos. It seemed that every department had its own. Some departments had symbols to represent each subunit. In fact one college had a letterhead with a dozen symbols across the bottom of the sheet, each representing a different department. Symbols came in every color, shape, and structure. Some were old-fashioned. Others were very contemporary. Fred was astonished to find samples of some letterheads that hardly made reference to the parent institution, where one

had to hunt to find the name Macro State University. It was a marketer's nightmare.

Fred frequently worked with the president's office. He decided to take his collection of logos to the president and seek advice. The president was sympathetic. It made sense when Fred described how corporations would never allow this sort of visual fragmentation. The president agreed to appoint a committee to look into the situation. Fred was to chair the committee, which included staff from the architect's office, public relations, the art department, and other parts of the university.

Committee members decided to use their mission statement (which accurately described the institution) and to seek professional help. Members interviewed three firms. They were impressed with the capabilities of one and asked it to begin work.

During the next few meetings the firm produced many drawings created by their design department. All sorts of graphic approaches were tried. After reviewing what seemed like hundreds of samples the committee selected one. It was quite simple and had the letters MSU rendered in outline. It was both contemporary, suggesting the modern university, and traditional in character. The firm showed ways the MSU logo could be used on letterheads, signs, athletic uniforms, vehicles, and television.

The final result appeared in the campus newspaper and everyone seemed to like it.

It has been five years since Fred came up with the idea for a common symbol. Even though he has left the university to become director of public relations at another midwestern university, he grins when he sees the logo on television or in print. It serves the university well.

Work Sheet

Making a Mark in Education

1. Collect graphic logos used by your institution. What kind of identifier is each?

2. Is your institution's logo an easy or complex communicator?

3. Ask people to examine your institution's logos. What information does each convey? How does this relate to your marketing objectives?

4. What other ways can you gain organizational identity? Recognition?

5. Is your logo directly related to your institution's current objectives?

6. Can your logo be used to position your institution in the educational marketplace?

Chapter 11 Communications

EFFECTIVE COMMUNICATIONS, as suggested by the diagram, take two forms: outreach and feedback. We may be producing communications to create awareness, describe educational opportunities, or indicate where services are offered. We also need to evaluate feedback to ensure that our audiences understand our messages. The communications function is not simple. It requires sophisticated skills and abilities. Most of all it requires a comprehensive understanding of organizational services, objectives, and goals.

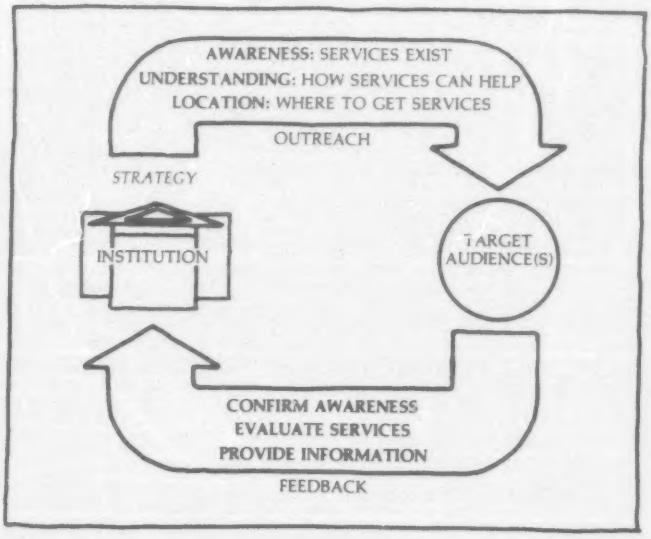

Figure 9. Communication exchanges.

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An institution of higher education, like any other organization, must direct communications to its markets and publics. There are five major communications instruments: advertising, publicity, personal contact, atmospherics, and outreach materials. To help market analysis and planning, you should classify the various promotional tools. Let's examine definitions of the five groups.

1. *Advertising.* Purchased time or space to communicate promotional information. Content can be carefully controlled.

2. *Publicity.* Information communicated by media (radio, newspapers, magazines, television), which is either created by the institution (e.g., news release) and thus carefully controlled or created by others (e.g., a feature story about your institution by a newspaper reporter) and therefore uncontrolled.

3. *Personal contact.* Oral presentation in conversation with one or more people for a specific purpose.

4. *Atmospherics.* Locations, such as an admissions office, designed in a way calculated to create specific cognitive or emotional effects.

5. *Outreach materials.* Printed or audiovisual materials that communicate information to targeted audiences.

Publicity, promotion, and advertising go hand-in-hand. In many cases, publicity is the senior and most important medium, conventional advertising being a subsidiary activity. To succeed we have to let people know about our successes. Many nonprofit groups have been creative in developing an aura around their products. We know from research and surveys, for instance, that for many people higher education is synonymous with quality. Incorporating the idea of quality can be a positive concept and can add to your institution's aura. Adding that idea to your identification can strengthen your image and improve your position in the marketplace.

A communications plan and strategy should relate to your marketing plan. Consider the media mix and effectiveness of each medium. Consider media versus interpersonal

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alternatives. Develop message strategies. Communications is one of the most powerful tools that you can use in promoting your institution.

In his book, *The Process of Communication*, David Berlo describes communications as the art of influencing—"to affect with intent."

In higher education, the major task is to analyze the reasons for communicating. Why are you communicating? What response do you want from your target audiences? How do these responses relate to a total marketing objective? Too often in preparing outreach materials we do what *we* want to do rather than planning the materials from the receiver's point of view.

Everything about an Organization Talks

Corporations have known for a long time that outreach materials determine company image. Many corporations have developed manuals that specify how materials should appear, including color, typeface, and logo. Some institutions, such as Southern Illinois University at Carbondale and the State University of New York at Albany, have done the same.

Every item (tangible and intangible) contributes to (or detracts from) an organization's character. Here is a list of items that may add to client perception of your institution.

- employees
- employees' dress
- staff
- the way phones are answered
- stationery
- business cards
- newsletters
- annual reports
- publications
- direct mail
- posters
- news articles
- feature articles
- logo
- products (curricular programs)
- extracurricular activities (athletic events)
- physical facilities
- vehicles
- signs
- exhibits

Institutional identity is a key element. It separates, identifies, or positions one organization from competitive groups. Identity is a statement of *who* and *what* you are. It contributes to the way people see your institution.

Words and visuals are tools that you can use to influence the public's perception of an institution. Think about our language. In it we have words to describe every emotion, attitude, and feeling. Subtle distinctions can be developed through writing. The creative writer, in translating reality into words, can give an honest, accurate, and imaginative portrayal of a school, college, or university. This picture is designed to evoke certain images in the reader's mind.

Designers, photographers, and television camera operators use visual representations to convert ideas to images. A graphic designer, for instance, has color, format, typography, illustration, paper textures, and production techniques available to translate the written message into printed form.

Creative people, working together, are critical to an institution's future. The products they produce can be instrumental in communicating the positive, accurate, honest image that an institution needs to establish its marketing position.

Outreach materials should build on an institution's strong tradition and heritage. Materials should not be slick, commercial, and hard-selling. Rather, materials should be sophisticated and designed to evoke feelings of quality. It is possible to combine marketing principles with commercial advertising techniques without sacrificing integrity—but it has to be done skillfully and carefully.

Why Is Design Important?

In 1964 Dr. Frank Stanton received the Michael Friedsam Medal from the Architectural League of New York. In his acceptance speech Dr. Stanton cited the value of quality design to his corporation:

> In an age when everyone is seeking to get everyone else's attention, when the demands made upon our senses increase daily in number, in persistence and in complexity, and when a hectic man-made world intrudes more and more upon the orderly and graceful world of nature, respect for superior design seems to me a minimum essential of effective communications and constructive human relationships.... I have never felt it to be a matter of corporate altruism for a company to erect its buildings or print its publications or manufacture its products in accordance with high standards of design. The company

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> merely acts in its own self-interest. More is derived of time and effort spent in congenial surroundings than in ugly ones. More attention is invited by the well-designed publication than by the haphazard one. More hospitality is extended by the purchaser, however utilitarian minded, to the beautiful object than to the ungainly one. Few communities are so lost that they do not welcome the attempt to better their appearance and resent the callousness that degrades it. And so the company that strives for quality in design, that respects the eye of those upon whom it is dependent—employees, stockholders, customers, the community—ultimately benefits most of all itself.[4]

A communications program forms a key role in marketing because it can do more than simply describe program activities. It plays an instrumental role in developing public awareness of an organization. It can influence legislators. It can promote objectives. It can generate interest. It can get more "bang for the buck." It can describe an organization to people who know little or nothing about it.

4. *Communication Arts* magazine, vol. 6, no. 3, May-June 1964.

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Case Study

MacIntosh College is a Canadian institution in the Province of Ontario. For many years (it seemed like decades), it had been administered by a conservative staff. The president and his immediate administrative staff were traditionalists. However, some faculty and staff felt that, although being traditional wasn't in itself wrong, the administration seemed to lack creativity. They couldn't quite put their finger on it, but they felt that something was missing. "Just look at the college's publications," they would say. "They're lackluster, unimaginative, and they don't do justice to MacIntosh." Young faculty and staff were particularly vocal in their criticisms.

Mary Warner swept into campus like a breath of Canadian spring air. She had studied communications and marketing at a large Toronto university. She had marketing, editorial, and design skills. It was unusual to find this combination of skills in one energetic person. Mary's first instinct was to round up as many printed pieces as she could find. She wasn't surprised by the results as she carefully arranged all the samples on a large table. All manner of color, design, typography, and illustration was used. Photography seemed to be an afterthought with no rhyme or reason. Pictures were used cosmetically—they didn't communicate vital information. There was no evidence of a carefully prepared marketing plan. The images created by the printed pieces were conflicting. They fragmented the college and didn't contribute to a predefined image.

Mary nervously tapped the manila portfolio of samples as she waited for her appointment with the president. She had heard stories of his conservative nature. She wasn't sure if he would accept the ideas she planned to present. Her heart flip-flopped as the door to his office opened and he greeted her. "Hello, Mary. I understand you want to talk to me about a new marketing image for the college. It's about time someone took the bull by the horns and developed some new directions. Our friends in admissions and development have been after me for months to get a new person on board to lead the way. I'm glad you've joined us."

Mary felt courageous as she described her plans to interview and hire a marketing research organization to gather data about the institution. She described how the information could be used to develop a comprehensive marketing plan. The plan could include many forms of media. Printed publications were, of course, part of the total picture. Mary described how communications could be used to promote the college's

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curriculum. The combined efforts would be useful in advancing the college's marketing strategy goals.

The president was impressed. He asked Mary to work out a marketing schedule and prepare a plan to present to the board of trustees and to the faculty senate.

Mary shook his hand firmly as she left his office. "That wasn't so bad after all," she thought to herself.

Mary's meeting with the president was probably one of the most important things that happened on campus that year.

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Work Sheet

Communications

1. List your institution's promotional efforts in each of the five communications forms: advertising, publicity, personal contact, atmospherics, and outreach materials.

2. Quality of communications outreach materials is critical in forming a positive client perception. How would you rate each of your outreach materials on a quality scale of 1 to 10?

3. Select a recent curricular promotional program effort. How could you use the program's communications to advance marketing strategy goals?

4. What's the strongest part of your institution's communications effort? The weakest?

5. Think about the next communications project you are going to prepare. How can you "affect with intent" your target audience?

6. Prepare an editorial audit of your institution. Gather all the written statements that have been used to describe your institution. Critically examine each. Which does the best job of marketing? What key common ideas emerge? How can you use those ideas for creative marketing? What are some new ideas?

7. Think about your institution visually. What images come to mind? List them. Survey images that have been used to pictorially describe your institution. Which can be used to communicate key ideas? What are some new ideas?

8. Begin to build a carefully selected library of photographs that are related to marketing your institution. Perform periodic reviews to make sure they are up-to-date. Remember, subtle (and some dramatic) changes are taking place every day. Make sure your photographic library is current. Look for opportunities to capture new photos.

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Chapter 12

Making Marketing Work

EVEN IN A COMPLEX ENVIRONMENT—and institutions of higher education are frequently politically and structurally complex—you can select some clear ideas and images to use in a marketing program. Ideally, marketing for a college or university should include the board of trustees, the president, faculty, administrators, staff, students, and alumni. Remember: people working together make marketing work.

Some things to remember when you are creating and carrying out a marketing program:

1. Use market research to help you plan your marketing approaches.

2. Develop a personnel structure that is appropriate for planning and implementing an integrated, marketing-oriented, institution-wide program.

3. Embrace a strategic planning mentality. Don't "do" programs; rather, advance marketing goals.

4. Study your track record. Identify strengths and weaknesses. Self-analysis through surveys and discussion with your fellow faculty and staff provides opportunities to assess what you have done, where you are now, and, most important, where you are going.

5. Incorporate a formal marketing management plan. Don't crank out random programs, events, brochures, and announcements. Instead, in the best of direct mail marketing, "make an offer" and "seek a response."

6. Segment your audience. Know the publics you want to attract. Identify constituents. Target efforts to preselected influential people. Determine characteristic demographics of each audience segment.

7. Position your institution. Focus on curricular programs to achieve clear organizational position. Use outreach efforts to position your institution. Don't try to be everything to everyone. Lead with your institution's strengths. Use surveys to evaluate your efforts.

8. Work to achieve a balance of aggressive yet tasteful promotion of educational programs. Know your media opportunities. Coordinate outreach efforts.

9. Identity is critical. Find every opportunity to project a comprehensive overall "umbrella" image for your institution. Make each program event come under the umbrella. Be consistent.

10. Identify competition. Educational institutions compete for many things: students, faculty, recognition, volunteers, donations, and funding.

11. Don't overlook your internal audiences. It's important to articulate your mission and plans to faculty, staff, and current students.

12. Exhaust your creativity. Continually experiment, reinvent, and test rather than replicate the work of others.

13. Remember the marketing mix. The four Ps of marketing are:

    Product: Know your product.
    Price: Know your economic marketplace.
    Place: Identify your location.
    Promotion: Promote through personal selling, advertising, and media outreach.

You can't be all things to all people. You must direct your efforts and educational wares to specific, identified segments of the market. Your efforts and programs should be compatible with your long-range goals and strategic marketing plan. Both you and your colleagues should be able to verbalize who you are, who you want to attract, and how you'll go about attracting them.

Remember, curricular programs can be considered good tactical activities if they contribute to long-range marketing objectives rather than simply solve short-range admissions problems. For example, do your programs contribute to your institution's marketing umbrella? Do they encourage consumers to investigate new efforts? Do they help support development and alumni activities?

As higher education continues into the 1980s, it will be under increasing pressures. Creative marketing techniques can help, not as a panacea but as a new way of looking at higher education. Some institutions may be in crisis situations. Others may be nearing a crisis. If this happens, keep in mind the Chinese word for crisis. It is made of two characters: the one means danger, the other means opportunity.

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ROBERT TOPOR began working on university advancement outreach materials while an undergraduate at Syracuse University. He received his bachelor's degree in advertising and journalism from Syracuse in 1958 and then worked as a graphic designer for Syracuse University Press before entering the military service.

While in the Army, Topor was stationed at White Sands Missile Range, New Mexico. He was supervisor of a technical illustration section, and he and his staff prepared illustrations and animation for missile research films.

In 1962, he returned to Syracuse University where he worked as production manager in the printing division.

In 1963, Topor accepted a position at the University of Rochester in its public relations department. For 11 years he worked closely with alumni, admissions, and development staff, designing materials for the university, Strong Memorial Hospital, the Eastman School of Music, and the Memorial Art Gallery. He received his master's degree in art history from the University of Rochester in 1971.

Topor moved to Princeton, New Jersey, in 1974 to serve as creative manager for Peterson's Guides, where he worked closely with many schools, community colleges, universities, and colleges in the Northeast.

In 1975, he became director of university publications at Wright State University in Dayton, Ohio. At Wright State, he developed institutional advancement plans for development, admissions, and alumni activities.

Topor began working as a senior administrator for Cornell University Media Services in Ithaca, New York, in 1979. In 1983 he was appointed director of publications and graphics for the San Diego Hospital Association.

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Recipient of many professional awards and recognitions, Topor is a dedicated teacher and practitioner of marketing and its application to higher education.

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A Note on the Type

The text of this book is set in 10/12 Andover, which is based on the typeface Palatino, designed by Hermann Zapf. He based the typeface on Roman characters found on the Trajan column. The manuscript was prepared on a Micom 2002 word processor and phototypeset by Cornell University Graphic Arts Services, Ithaca, New York.

MARKETING HIGHER EDUCATION

A Practical Guide

CASE